

**Washington State
Department of Enterprise Services**

SPACE ALLOCATION STANDARDS

VOLUME 2

TECHNICAL REPORT

RESEARCH AND FINDINGS

September 2011

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PREFACE

RCW 43.82.010(2) requires that state facilities acquired under RCW 43.82 “*shall conform to standards adopted by the Director [of General Administration] and approved by the Office of Financial Management governing facility efficiency unless a specific exemption from such standards is approved by the Director of General Administration.*”

GA’s *Space Allocation Standards Policy* (and supporting Manual), effective December 29, 2009, establish size standards and guidelines to be used in assigning space to state agencies and promote employee productivity and the functional, equitable, efficient, and flexible use of space.

Measuring the efficiency and effectiveness of how state government utilizes its facilities is a critical component of better asset management and provides opportunities for increased productivity and reduced costs. Space allocation standards allow organizations to plan for new space, to evaluate usage of existing space and to benchmark against public and private sector best practices.

This report provides an examination of “industry best practices” and compares Washington’s current approach with these benchmarks. It recommends enhancements to the current approach resulting from the research as well as areas for further study.

What is “best practice”?

Best practice means finding-and using –the best ways of achieving your business objectives. By keeping up-to-date with the ways successful businesses operate—in your industry/sector and others—and measuring your performance against metrics used by the industry/sector leaders, you will learn from the experience of others. Benchmarking allows you to compare your business results with those of other successful businesses and to highlight areas where your business operation could improve.

This report is divided into two volumes:

- Volume 1: Provides a comprehensive discussion of conclusions and recommendations.
- Volume 2: provides the description of the research and information about other public sector organizations which are involved in setting facility efficiency standards in the United States and elsewhere in the world.

I. RESEARCH

A. Process

Introduction

After the Space Allocation Standards Policy was updated in December 2009, a team comprised of planning staff was established and directed to:

- Review the state's current space standards and practices
- Research other states and other public sector entities for “best practices” and appropriate benchmarks
- Explore different approaches for the application of standards
- Recommend whether to retain, update or revise the current standard and how it is or should be applied based on the results of the research
- Develop a plan to implement changes to achieve a new recommended standard, or alternatively recommend a plan to incrementally improve the current standard

Scope

The team was asked to identify and evaluate different approaches that may be used by other states, such as:

- Based on “one size fits all”—one number as is currently the case in Washington
- Based on a range
- Based on different “numbers” for different functions (administrative/service delivery/field/Headquarters)
- Based on different types of agencies or their missions, for example, general government/natural resources/social services

Methodology

The research was multi-faceted and extensive. The websites of all 50 states as well as the federal government were examined, as were those of the Canadian federal government, 3 Canadian provinces, the Australian federal government and 3 states and that of the British government. (**Appendix B** provides a glimpse). We contacted over 30 states with follow up requests for more data, and interviewed the relevant staff from ten representative states (**Appendix C** contains the questionnaire that formed the basis of the interviews as well as some of the summaries of some of the interviews).

The research attempted to identify the following:

- Space allocation standard:
 - ✓ Did the entity have a standard?
 - ✓ What was the standard based on-- function, based on position classification, or was it a single standard
 - ✓ How was it used
 - As a base/aggregate/average
 - For budgeting purposes vs. space planning purposes
 - As a guide or target

- Enclosed office vs. “open space plan:
 - ✓ Did the state have a policy or encourage open office plan (cubes”)
 - ✓ Did the state employ a “ratio”
 - ✓ Was it a requirement or guideline
- Support space:
 - ✓ Were there clear definitions—what was in and what was out?
 - ✓ Did the state use ratios—e.g. so many conference rooms per FTE
 - ✓ Did the state require justification for support areas (e.g. based on numbers of people using the space or the number of times it would be used during a time period)
- Special program areas:
 - ✓ Were there clear definitions?
 - ✓ Was justification required and in what form
- Circulation:
 - ✓ Did states have a defined circulation factor
 - ✓ How was it applied?
 - ✓ Was it used as a multiplier?
- Exception or Exemption Process:
 - ✓ Was there an exceptions process
 - ✓ How was it applied
 - ✓ What was it applied to?

How is Space Allocation Used

In some states, the procedures that include certain space and utilization criteria that are used for the completion of an inventory of facilities are also used for standards. In others, standards are specific planning criteria to be used solely in the preparation of capital budget project requests. Elsewhere, there are separate policies, distinguishing between “space planning standards” and “space programming standards”.

A number of states consider “standards” to be:

- Flexible guidelines vs. absolute standards
- Minimum expectation vs. maximum threshold

Several states that reference standards as guidelines also caveat that the space size is not an entitlement but rather the maximum (not minimum) of space to be allotted. Many have a “standard expectation or target”—based on one number.

Most states apply a quantitative solution — square feet/person or square feet per full time equivalent (FTE). A few use square feet per workstation. However, a number of them are moving towards using additional, sometimes qualitative factors, such as how space can be designed to facilitate specific functions.

B. Findings

The research findings are summarized into the following categories:

1. One Aggregate Number

Some, but not all, of the public sector organizations use one aggregate or average space allocation number similar to Washington's approach. While in general, it appears that Washington was in the mid-range, it also appears that a number of the states using this approach were reducing that aggregate based on the push for higher utilization and density that could be accomplished with "alternative work strategies". In addition, those that maintained a single standard, allowed for flexibility through a formal or informal process of exemption.

The U.S. General Services Administration (GSA), after numerous studies, has continued to use its office benchmark across the federal government¹. The standard, identified in most GSA publications is 200 usable square feet/person, which is adjusted upward by 15 percent to reflect rentable square feet = 230 rentable square feet/person.² However a recent document appears to redefine the federal benchmark to 190 usable square feet or 218 rentable square feet.³

A number of organizations who utilized an aggregate number, indicated that it was generally used for planning purposes and that a more "exact" approach was utilized for programming purposes. In this phase, the actual number and size of work stations were calculated as well as support and special program space, similar to the approach in Washington's Space Allocation Manual and "Space Datasheet".

A number of states use a range for the aggregate. Kansas, for example has two components of space allocation.⁴ The first is an overall space allocation standard expressed as a range of 210 Useable Square Feet – 250 Usable Square Feet. However, this is not applied to individual workstations, but to the aggregate usable square feet within the tenant agency's demised area divided by the number of workstations. Individual workstation sizes are based on the function of the person assigned to the workstation. For example, an agency director/administrator would be assigned 180-225 SF; professional staff assigned 110-130 SF and so on. Indiana uses 200 SF/person and space size that exceeds this benchmark by more than 10 percent must be justified by agency and approved by the Department of Administration.⁵

Some states, such as Wisconsin⁶ and Delaware⁷, do not have a specific aggregate standard and use individual space allocations based on individual positions or functions.

¹ GSA apparently does not "enforce" this benchmark.

² General Services Administration: Real Property Performance Results. December 2002.

³ General Services Administration: Workspace Utilization and Allocation Benchmark. July 2011.

⁴ Kansas Department of Administration: Office Space Standards, April 2003

⁵ Indiana Department of Administration: Real Estate Leasing Manual, 2009

⁶ Wisconsin Department of Administration: Office Space and General Facility Design Standard, 2011.

⁷ Delaware Division of Facilities: Space Standards Summary, 2011

Some public entities have adopted separate targets for “existing space” and for “new space”. The State of New South Wales, Australia in 2002 adopted a target of an average of 194 SF per person across its whole portfolio. In 2005, this average target was changed to 183 SF per person, while a target of 161 SF per person was set for new space.⁸ As a whole though, most of the public sector organizations that were evaluated in Australia, Canada and Britain maintained a single aggregate number. The EU is considering establishing a single aggregate number: “Only if we use a single standard for space measurement can we be sure we are comparing apples to apples. In all other cases we are doing a best possible scientific guess. This is why a single European standard for space measurement is needed.”⁹

2. Different Approaches

(a) Standard Based on Aggregate Functionality

The research did not indicate whether there were any states that used a “functional” state-wide basis for an aggregate standard, such as a specific standard for each of the functional areas of government, similar to the one used by the Six Year Facility Plan. In the same way, the research did not identify any states that had standard designed to accommodate the differences between headquarters, field, service delivery, administrative functions. While most did acknowledge that there were some types of offices that did not fall easily into a “one size fits all” box, many also indicated that that this variation was “taken into account” on a case-by-case basis. They all acknowledged the differences for example between a general office and a state attorney general set up. A small number of the organizations recognized the differences between the courts/judicial function and other government functions. This is reflected in GSA’s standards as well as other public sector organizations, both in the US and elsewhere.

(b) Standard Based on Individual Positions/Functions

Some states still retain space allocation standards based on (classified) **positions** but most have transitioned to square feet per **functional groups**. These functional groups may be based on level of authority (e.g. executives, senior managers are assigned more space than managers/supervisors and so professional staff less and so on). Certainly a majority identified higher level management as being accorded more square feet (and hard-walled enclosed private offices).

(c) Standard Based on Work Patterns

A number of the public sector organizations encountered in this research, both in the United States and elsewhere have utilized the research and theories of Francis Duffy, a British architect and planner who focused on “the enabling qualities of the office environment in facilitating the achievement of organizational goals”.¹⁰ Duffy defined work settings based on:

- Patterns of work

⁸ New South Wales Department of Treasury: Total Asset Management Guideline-Office Accommodation Strategic Planning. June 2007.

⁹ Essential FM Report #80, November/December 2009, page 6.

¹⁰ Francis Duffy: The New Office. Conran Octopus, London, 1997.

- Patterns of occupancy
- Type of space layout
- Use of information technology

He proposed a new design logic for the office environment that identified four distinct work patterns or processes based on the degree of interaction and autonomy involved in the job. These are:

- Individual work process
- Group processes work
- Concentrated study work
- Transactional knowledge work

A number of Canadian provinces and some US states have based their approach to space allocation on Duffy's theories.

Other states use **work patterns** or tasks. For example, British Columbia uses five groups: specific task oriented work, such as data entry, who are assigned approximately 48 square feet, multi-taskers (the assumed base—at 70 square feet) and more intensive multi-tasking plus visitors at 100 square feet.¹¹ The other two categories are for enclosed offices the size of which depend upon the number of meetings daily with others—in addition to meeting the basic criteria for private enclosed offices.

The Province of Ontario, while establishing an “aggregate” or “macro” (maximum) of 200 rentable square feet/person, which it “translates” as 180 usable square feet (USF) per person in an “efficient building”, uses work patterns based on the level of interaction with others and level of autonomy in “usable square feet” (rather than rentable square feet).¹²

Figure 1

Work Pattern	Interaction	Autonomy	USF/Person	Open/closed
Individual routine process work (continuous occupancy/regular work hours)	Low levels	Low levels	150	Open office plan
Individual concentrated work (continuous occupancy/regular work hours)	Low levels	Moderate levels	180	Open office plan
Individual concentrated work (intermittent use/extended work hours)	Low levels	High levels	220	Private office
Group process work Range of settings from open office to team space Regular occupancy patterns Regular and irregular hours	High levels	Low levels	170	Open office plan
Transactional knowledge work based on “multiple occupancy of individual work areas”.	High levels	High levels	115	Team/ collaborative space

¹¹ Shared Services BC, Accommodation Branch: Government Office Space Standards, January 2008.

¹² Ontario Department of Infrastructure: Office and Workspace Guidelines, July 2005.

Interestingly, Ontario identifies the “individual concentrated work pattern” with the legal profession (among others) because autonomy is high and interaction low. Finally, Ontario expects that as information technology changes the nature of work, many offices designed for concentrated and group processes will “migrate” into the “transactional office” where interaction and autonomy can be maximized.

Missouri links each job class to a functional work space code.¹³ Minnesota establishes 3 cube sizes (6 x 8, 8 x 8, and 10 x 12), then associates each with differing job content (high, medium and low computer use, work surface use, storage needs, meeting, privacy needs).¹⁴ In a similar way, Connecticut differentiates between individuals doing “solo work” at a clerical or administrative level (64 SF), individuals with more interactivity (75 SF-110 SF), the professional level (80 SF) and the managerial and executive level (50 SF for more “conferencing” within their workspace).¹⁵

(d) Standard Based on Graduated Occupation

The North West Territories of Canada use a somewhat unique calculation. The space allocated for an agency is based on a “graduated approach” (described in Figure 2 below) of how many full time equivalents will be occupying the space.

Figure 2

<i>FTEs</i>	<i>Usable SF/FTE</i>
First 5 FTEs	246 SF
Next 5 FTEs	195 SF
Remaining FTEs	185 SF

(e) Work Styles Approach

GSA created a “work styles framework” based on the level of employee mobility and interaction—which it has applied to encourage broader use of alternative work strategies.¹⁶ The work style determines the size of the workstation and whether it is an “assigned seat” or “shared seat”.

In many cases, states have reduced the square feet/person ratio by excluding “special needs space” and some “support space” and intensifying scrutiny of these spaces. A number of states are emphasizing space allocation as guidelines, which coupled with early and intensive space planning on each individual project, is intended to ensure efficient and effective space while meeting tenant agency requirements.

3. Guiding Principles

A number of public sector organizations have developed and operate under a set of “assumptions” or guiding principles. These include the following:

¹³ Missouri Office of Administration: Statewide Space Standards, 2006

¹⁴ Minnesota Department of Administration: Customer Guide to Space Planning, March 2011.

¹⁵ Connecticut Department of Public Works: Statewide Space Standards Manual, November, 2005

¹⁶ GSA Public Building Service: Leveraging Mobility, Managing Place, 2010.

Alaska¹⁷

- The state's real property is an asset that has value to the state. This asset should be managed and maintained in a manner that enhances its value.
- State work space is a costly resource and should be acquired and used in the essential minimum amounts needed to support agency missions.
- State workspace should support and improve the productivity of the workers and the programs that are housed.

Kansas

- Work spaces are sized for work performed, not as file storage units.
- Work spaces are sized for job functions, not job titles or classification level.
- Large file cabinets should be located outside of cubicles or in common file storage areas.
- Common space and meeting rooms should be utilized as much as possible to reduce the need for private offices, including supervisors meeting with employees (i.e. being a supervisor does not, in and of itself, mandate the need for a private office).

General Services Administration

- Spatial fairness: Meet the functional needs of users and their work, and provide individual access to daylight, privacy, outside views, and aesthetics.
- Healthfulness: Create a clean, environmentally sustainable health workplace with good acoustics, air quality, and light; meet the requirements of LEED for Commercial Interiors.
- Flexibility: Choose workplace configurations and components that occupants can move themselves to accommodate change.
- Comfort: Provide workplace services, systems and components that allow occupants to adjust thermal, lighting, acoustic, and furniture systems to meet personal and group comfort levels.
- Technological connectivity: Enable full communications and simultaneous access to data among distributed co-workers both on and off-site, including hotelling and Telework space.
- Reliability: Support the workplace with efficient, low-maintenance, state-of-the-art heating, air conditioning, lighting, power, security, and telecommunications systems/equipment and backup capabilities.
- Sense of Place: Endow the workplace with a [GSA] character, image, and business identity that creates a sense of pride, purpose and dedication.

British Columbia, Canada

- Employees will be treated equitably and provided with healthy, safe and accessible office workplaces.
- Office workplaces will be designed to support effective program delivery.
- Minimizing value for money will be the goal of all facilities decisions.

¹⁷ Alaska Department of Administration: [Space Allocation Standards](#), June 2004

- Cost containment strategies, such as the re-use of existing tenant improvements, will be applied to all projects.
- Ministries and British Columbia Building Corporation (BCBC, GA-RES equivalent) are jointly responsible for applying these standards to all projects.
- Standards will be clear and concise. Associated processes will be simple and easy to understand and implement.

Northwest Territories, Canada¹⁸

- Standards and guidelines should be simplified and be easily understood. This principle recognizes that in order for the standards to be adopted across a variety of audiences.
- Space should be allocated according to functional requirements. This principle recognizes that simply allocating office space to people based on their position or rank in an organization hierarchy rather than the functional needs of their work may result in a less productive workplace and additional costs.
- Space should be flexible. This principle recognizes that fewer barriers to change, less disruption when change does occur, and lower costs in money and time can be accomplished by:
 - Using open space planning whenever practical
 - Reducing and standardizing the number of different sizes of spaces

4. Open Space Plan and Enclosed Private Offices

The International Facility Management Association (IFMA) produced a study¹⁹ in 2010 that highlighted the trend towards open office plans, including what it described as “open seating”.²⁰

Figure 3 Office Type

Year	Private Office	Open Office	“Bull Pen”/Team Areas (open areas with no partitions)
1997	36 percent	64 percent	
2010	34 percent	59 percent	7 percent

Source: IFMA: *Space and Project Management Benchmarks 2010*

Both the General Services Administration’s Workplace 2020 report²¹ as well as the IFMA study indicated that office size (both modular/cube as well as private enclosed offices) demonstrate a trend to reduced space utilization. However, factors such as layoffs and stagnant hiring due to the economic crisis, more people working off-site and the growth of collaborative space may actually hide this trend, elevating the total amount of space per person available throughout the office. Additional factors such as a change in culture driven by a younger workforce, an increase in the number of

¹⁸ Government of the Northwest Territories: *Office Space Standards and Guidelines*, February 2003.

¹⁹ International Facility Management Association: “*Space and Project Management Benchmarks 2010*”

²⁰ Open Seating is defined as: either no partitions or 30 inch high partitions.

²¹ GSA Public Building Service: *The New Federal Workplace: A Report on the Performance of Six Workplace 2020 Projects*, June 2009

organizations offering workspace not assigned to any one individual and new technology such as flat screens that require less desk space further reinforce this trend.

Figure 4 Office Size by Type of Worker

Type of Employee	Office Size SF 1997	Office Size SF 2010	Percent in Open Space Plan 2010	Percent in Bull Pen/ Team Areas 2010
General Clerical	73	68	85	10
Senior Clerical	84	78	83	6
Professional/Technical	92	79	79	8
Senior Professional	114	98	61	2
Mid-Management	142	121	37	1
Senior Management	193	170	11	0
Executive	280	241	4	0

Source: IFMA: *Space and Project Management Benchmarks 2010*

Numerous studies have indicated that the space taken up by enclosed private offices clearly carries a significant cost overhead.²²

A significant number of states are emphasizing “open space” offices vs. enclosed offices. Most do not require or specify a ratio. Only Washington and Florida²³ have a specific ratio (which is not treated as a “requirement”). While New York does not have a formal policy regarding “open workplace”, it has moved aggressively to renovate existing space along an open space environment. For example, in 2006 it renovated 135,244 SF of usable office space, using systems furniture in an open space configuration, at its Empire State Plaza Building in Albany. Before the renovation, the building housed 645 employees; after the renovation is housed 814 employees in the same amount of space (20 percent increase). It claimed that it will save \$1.40 for every dollar spent over the next ten years.²⁴

Oregon

"Open Landscape" office design is the standard approach for state owned and leased facilities. The Department's objectives are to:

- Reduce initial costs
- Increase sustainability
- Reduce the expense for future remodeling
- Increase flexibility
- Contribute to employee productivity

²² Brill, M. Margulis, S.T. and Konar, E.: *Using Office Design to Increase Productivity*. BOSTI, 1986; Becker, F. and Sims, W.: *Offices That Work: Balancing Communication, Flexibility and Cost*. Cornell University, 2001; National Audit Office: *Getting the Best from Public Sector Office Accommodation*. National Audit Office, London, 2006.; Thompson, B. and Jonas, D.: *Property in the Economy: Workplace Design and Productivity-Are They Inextricably Linked?* Royal Institution of Chartered Surveyors. London, 2008

²³ Florida Department of Management Services. *Workspace Standards*, 2002

²⁴ New York Office of General Services: *New Work Environment: Planning for the Future*, 2006

- Minimizing floor to ceiling walls contributes to efficient and effective environmental control and promotes the use of natural lighting.²⁵

A number of public sector organizations require “justification” (whether formal written or informal) for each private enclosed office. For example:

Alaska

The “Open Office” design will be the standard design for State owned and leased facilities.

- The Department’s objective is to reduce initial costs, minimize the expense associated with future remodeling and maximize flexibility. Minimizing floor to ceiling walls also improves efficient interior environmental control and maximizes exposure to natural lighting which contributes to employee health and productivity.
- Enclosed offices and other enclosed spaces shall be located in the interior (core) areas of office space rather than on windowed exterior walls. The Department’s objective is to provide natural light for the maximum number of employees, and to better dissipate heat and cold from exterior walls and windows.
- Enclosed offices for personnel, who are below the Administrative level on the Office Space Standards Table, require written justification and approval [*emphasis added*] by the administrative director, based on the duties and responsibilities of the position.

British Columbia, Canada

In general, BC’s policy is open workspace. However, enclosed offices will be provided to:

- Employees requiring high degree of unscheduled confidentiality from other employees on a daily basis (e.g. those dealing with sensitive personnel issues)
- Employees requiring confidentiality when dealing directly with the public
- Employees requiring acoustical and visual privacy due to nature of their tasks
- Employees dealing with or supervising people under confidential or stressful conditions

The determination of private offices as defined is at the discretion of the Deputy Minister (an elected official) or designated signing authority.

5. Conventional vs. Systems Furniture

A number of states, while encouraging the use of systems furniture for open workspaces, continue to differentiate between conventional and systems furniture in terms of space allocation standards. Connecticut makes the assumption that systems furniture will be used, though it does not appear that it has made this a formal policy/requirement. Oregon and Wisconsin actually differentiate between SF per employee using systems furniture or conventional furniture. In addition, Oregon uses a different circulation factor (45 percent for systems furniture and 30 percent for

²⁵ Oregon Department of Administrative Services: Space Standards-Policy 125-6-100, July 2003

conventional furniture). New York provides space allocation standards for both conventional and systems furniture. A number of states stress the advantages/benefits of using systems furniture. For example:

Alaska

- Built-in casework or cabinets shall be minimized in favor of freestanding or modular components, which are easily moved.
- Agencies are encouraged to use Systems Furniture to reduce the amount of space needed and increase flexibility and ergonomic adjustability.

Massachusetts²⁶

Massachusetts asserts that modular systems furniture may reduce the square footage required for a workspace (open or enclosed) and may create areas more adaptable to changes in operations, may reduce the costs of leases and tenant improvements. The Department “urges agencies to evaluate the advantages of investing in systems furniture.”

Alberta goes even further by identifying the differences in its space allocation (which it bases on position levels) between conventional and systems furniture. Interestingly, it also uses a “macro standard” for planning purposes.

Figure 5 Alberta, Canada Space Allocation Table

Range	Representative positions within each functional group	Open workspace/ enclosed private offices	Macro Standards (for planning use only)	Micro standards (for use with conventional furniture)	Micro standards (for use with systems furniture)
1	Executive management staff	Private office	375 USF	291 USF	200 USF -274 USF
2	Senior management staff	Private office	325 USF	194 USF	129 USF – 161 USF
3	Middle management staff	Private office	275 USF	161 USF	108 USF – 129 USF
4	Supervisory/professional staff	Open workspace	225 USF	129 USF	100 USF – 108 USF
5	Technical & regulatory staff	Open workspace	175USF	97 USF	80 USF – 100 USF
6	Administrative support staff	Open workspace	125 USF	86 USF	80 USF – 100 USF

Source: Consultant Guide to Accommodation and Tenant Improvements

A number of states, Washington included, provide standard layouts for 8’ x 8’, 6’ x 8’, and 10’x 12’ workstations. This is a reduction of multiple layouts of the past and assumes standardization of furniture system cube sizes. The result has simplified choices while allowing for variation within footprint.

²⁶ Massachusetts Department of Administration and Finance: Manual for Leasing and State Office Planning, February 2006.

Minnesota has gone further.²⁷ It has developed a new set of layouts focused on alternative work strategies such as shared desks and collaborative/team space. The new workstation standards are intended to provide more configurations so that the work function can align with the most appropriate workstation layout. In the process, it has reduced the basic workstation from 8' x 8' to 8' x 6'.

California has a basic workstation size of 64 square feet via 8' x 8'. Any request for a larger workstation needs to be accompanied by written justification and receive the approval of the Real Estate Services Division.

6. Justification for Private Enclosed Offices

A number of public entities require specific justification for the assignment of private office space to any position not so designated. This is generally an accompaniment of a fairly strict/restrictive approach to the assignment of private enclosed offices. Some entities, such as Alaska, require justification for any space, such as support space and special program space beyond the specified allocations. The following examples provide an application form and process along with the requirement.

British Columbia, Canada

Private offices may be provided for staff with senior management responsibilities (Director and above). All other staff enclosed office requirements must be approved by the Deputy Minister or designated signing authority. Further approval may be required by the Secretary to the Treasury Board.

Manitoba, Canada

Requests for deviation from the provincial Office Space Guidelines must be accompanied by a justification, client departmental senior management level approval, confirmation of funding, and acceptance of accountability for any project delays incurred in the approval process. The funding will cover all direct and indirect costs related to the implementation of the non-compliant item(s) or services, including management and design services, project delays, and on-going operational costs.

7. Exemptions/Exceptions Requirements

Some public sector organizations require written requests from exemption or waiver from the standards. Others have a more informal process, such as contacting the “authorizing agency” with an explanation. Informality seems to be the general approach. However, in our follow up in depth interviews, a number of entities expressed concern that such an informal process eventually reduces the credibility of the use of a standard, or it becomes an approach infused with inequity. At the same time, some of these entities indicated that experience in the field and rapport with the agencies and awareness of each agency’s “uniqueness” allowed such informal systems to operate. Some of the problems raised can possibly be the result of a lack of authority accorded the central organization responsible for overseeing or operating state housing.

²⁷ Minnesota Department of Administration: Flexible Work Environments, March 2011.

The research revealed a number of public sector entities that had an effective requirement related to exemptions to standards. For example:

Oregon

Any request for space, which does not follow the Space or Planning Standards, or those spaces or layouts specifically requiring justification under this policy, shall include a written justification. The justification must be approved by either the requesting agency head or designee, and meet at least one of the following tests:

- (1) The building shape, size, or configuration make it difficult to achieve efficient layouts and proper relationships between work units without varying from the standards; or
- (2) Existing walls, features, or other elements mean that cost savings are achieved by leaving some non-compliant spaces or layouts in place; or
- (3) Unique and special duties of certain staff or functions cannot fit into the standard amount of space.

Before the space request or layout is authorized, the justification must also be approved by the Department of Administrative Services Facilities Division. Enclosed offices for staff below the Manager level on the Office Space Standards Table require written justification based on the duties and responsibilities of the position occupying the office and approval by the agency head and the Division.

C. Summary of Findings/ Observations/Conclusions

The following is a summary of findings and observations.

- A few states have a “single aggregate number” approach similar to Washington; however, nearly all public sector organizations in other countries such as Canada, Australia and Britain used a single aggregate number.
- Some have a range
- Many organizations use position function as a determinant to assign individual space. Some apportion square feet by position classification
- Square feet/per person or FTE targets range from a low of 150 to a high of 250 with an average of 197-210
- Many promote ‘open office’ layout, but very few specify private office to systems furniture (cubicle) ratio
 - Several states specify workspace type (enclosed/hard wall office vs. cubicle) and SF size by job classification or function
- Exception to standards is triggered by high number of private offices or questionable number or size of support space
 - Exception requests are submitted in writing with documentation as required
 - Decision is made by real estate manager or above

Best Practice

Based on the findings and observations, the following correlate to “best practices”:

- Standardize and simplify components of space standards to create more generic layouts
- Optimize utilization of workspaces and support areas
- Move people not furniture

Trends

- Space allocation standardization is being accompanied by layout and furniture standardization.
 - Single furniture standard promotes economy of scale in procurement and redeployment
- States with centralized real estate function and decision-making:
 - Report quantifiable gains in space efficiency
 - Space is viewed as a state-wide resource
- States with a decentralized real estate function and decision-making report that:
 - Space standards are “promoted” by staff although agencies may or may not comply
 - Agencies perceive space “ownership” lies with them
- Increasing centralization – recognition of “enterprise” approach

Conclusion

The tentative conclusion of the research was that we should look to implementing “best practices” related to the application of the standard by examining the “building blocks” vs. trying to change the standard or correlate it to a number of functions.

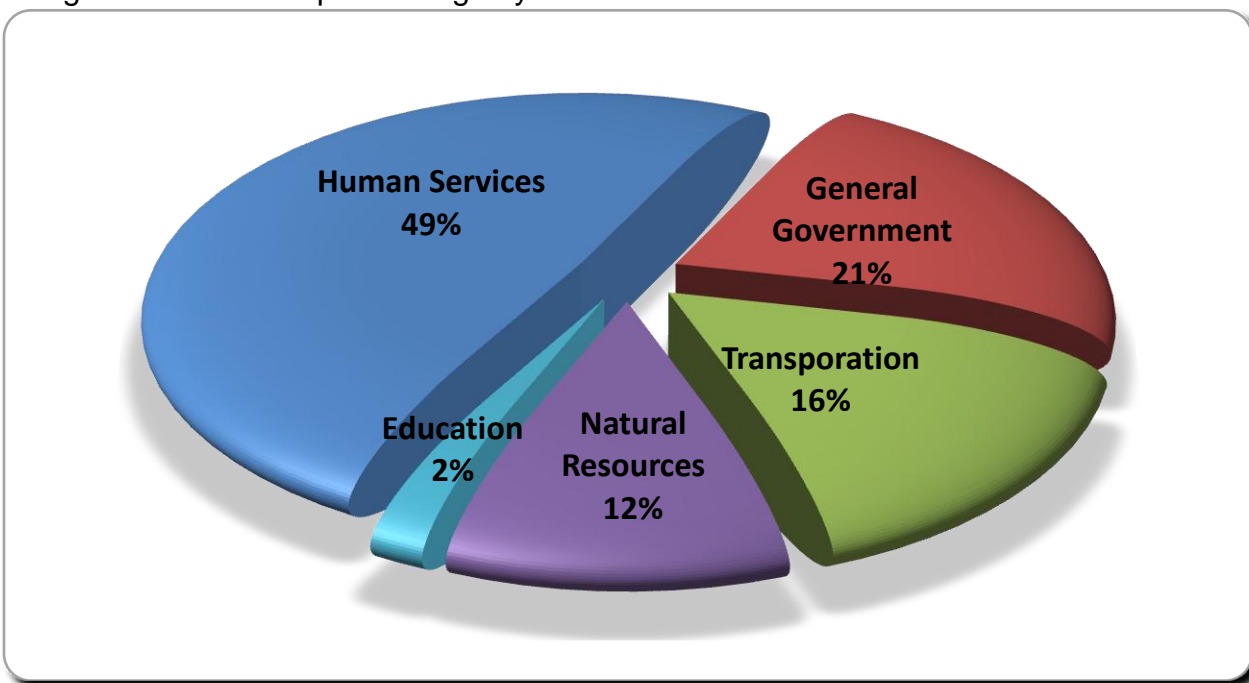
II. Current Practice in Washington State

Introduction

The current Six Year Facilities Plan 2011-2017 describes part of the universe of state facilities. It focuses on office space and warehouse/storage space (approximately 85 percent leased facilities and 15 percent state-owned facilities). However, the data in the Plan is only a subset –approximately 15 percent -- of the total state inventory. It does not include higher education institutions, state-owned correctional institutions, state-owned military facilities and state-owned residential campuses.

Based on data collected through April, 2010, the Plan includes 1,060 facilities comprising of 13,426,400 square feet. The Plan indicates that the square footage resulted in approximately \$240 million in annual lease costs, debt service and operating costs. According to the Plan, state agencies occupied 12,452,300 square feet of office space and 974,100 square feet of warehouse storage space. The following chart breaks this down by functional area.

Figure 5 Current Space Usage by Functional Area



Source: 2011-2017 Six Year Facility Plan

The Plan proposes to reduce the total square footage for state facilities by approximately 960,700 square feet, or approximately 7.2 percent, by 2017.

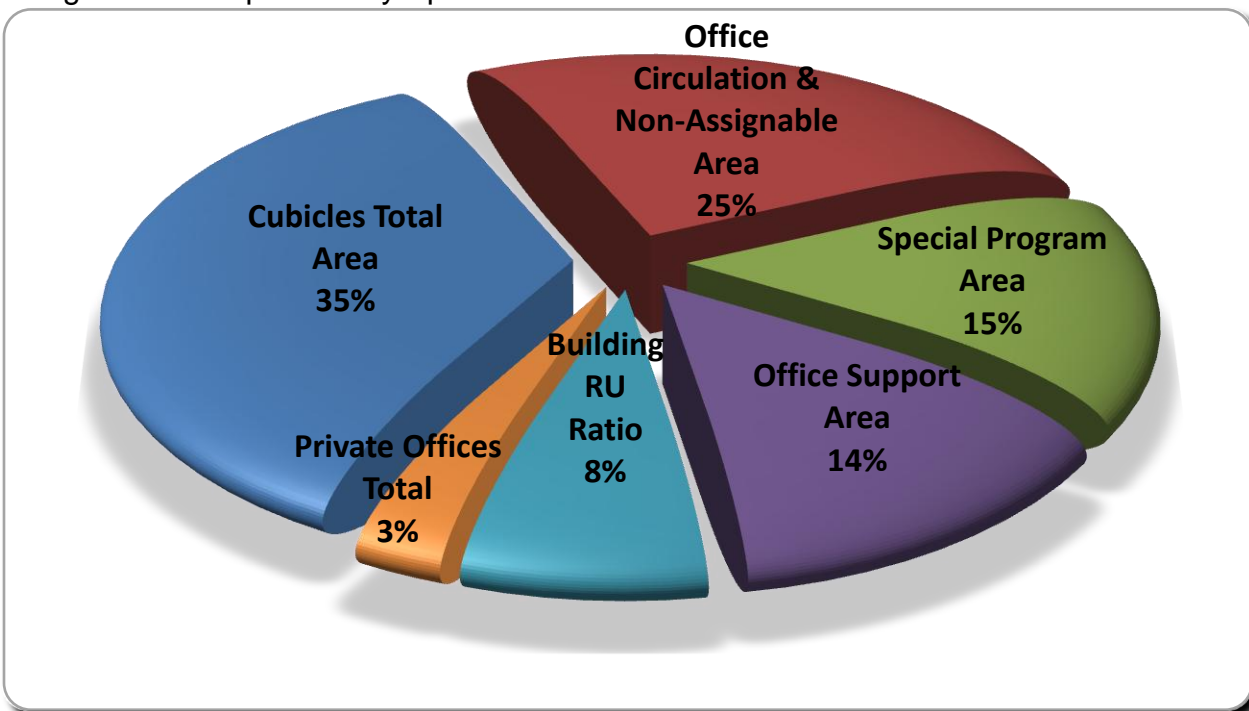
Neither the Plan, nor GA's database contains accurate information about the total number of people or the number of work stations in office space. Thus, the concept of "Full Time Equivalent" (FTE) has been used as a metric to understand how agencies use space, even though the Space Allocation Standard uses "person per rentable

square foot”. FTE is generally as a trend measure for budget planning rather than as a measure for design or space planning.

Current Standard and Applications

- Establishes a target of 215 Rentable Square feet per person
- Recommends a ratio of 10 percent offices to 90 percent cubicles
- Provides agencies with some flexibility to customize layouts if the result falls within these performance measures

Figure 6 Sample Facility Space Allocation Breakdown



Source: Applying Space Allocation Table from Space Allocation Standard Manual

This sample Facility Space Breakdown diagram demonstrates one possible example of space distribution within an office facility. The actual portions of space allocated to these functions may vary from program to program and from building to building. As a general rule, the largest amount of space will be allocated for cubicles.

Based on current Space Allocation Standards no more than 10 percent of the staff should be housed in private offices. Office support areas may include copy rooms, break rooms, restrooms, conference rooms and storage areas. Special program areas may include public lobbies, hearing rooms, classrooms or other functions that may be unique to a given program. Office circulation and non assignable areas include the required internal circulation between cubicles and main access routes throughout the facility as well as space dedicated to interior walls and other non assignable space. Building RU Ratio (Rentable Area/Usable Area), is included in facilities that are calculated per the Building Owners and Managers Association (BOMA) Rentable

method²⁸ and includes building common spaces such as the entry lobby or other shared functions, as well as any shared lobbies, restrooms or egress corridors that may occur on the same floor as the facility. In some cases where the state occupies the entire building of a leased facility, the lease may be measured as gross space and would include the building shell.

The current modified pre-design space planning document and past space request documents use a methodology for estimating the amount of space needed starting with an inventory of the required cubicle, office, support and program spaces. These forms use Calculations to estimate the amount of circulation space and building RU ratio and arrive at an estimated Rentable Space. It should be noted that these estimates do not take into account factors that may influence the efficiency of a building such as column grids, floor plate sizes, or unusual architectural features on a given building.

Methodology

In an effort to identify both in more detail and more broadly how agencies utilize space, the team conducted research on current practices. Data from the 2009-2015 and 2011-2017 Six Year Facility Plans was analyzed as well as current data from the Lease Inventory System (LIS) and data derived over the last two years.

Findings and Observations

In the Six Year Facilities Plan Alternatives Document for the 2009-2015 Six Year Facility Plan, OFM reviewed the GA Space Request and determined that the document allows for a space allocation range of 195 to 261 square feet per person.

Of the 1,248 facilities that were reported to OFM for the Six Year plan, it was determined that less than 1/3 of the facilities fell within the allowable range.

The analysis conducted by OFM data indicates that with a few notable exceptions larger facilities with more workspaces tend to use less space per person than smaller spaces. It was also determined that different types of agencies such as Transportation, Social Services, Natural Resources Agencies, State Patrol, General Government, and Hearings & Legal, all follow different trends or 'curve fits'. OFM also determined that service delivery facilities typically use more area per FTE than administrative offices for the same agency. The information provided by agencies to OFM did not include sufficient detail to relate the amount of space associated with service delivery with case-loads or other metrics.

1. What is a typical state facility?

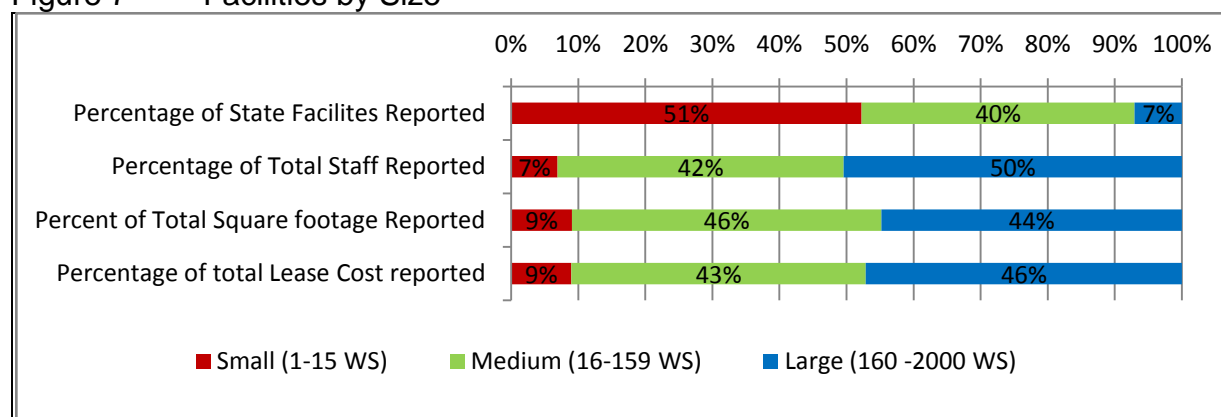
From the data that OFM provided from the six year planning process during the 2009-2015 Six Year Facility Plan, some interesting trends were identified. Of the 1,248 reported facilities, 220 facilities (18 percent) were reported as being unmanned. This represents about 4 percent of the total square footage reported and 2 percent of the total lease costs.

²⁸ Building Owners and Managers Association International: "Standard Method for Measuring Floor Area in Office Buildings", 1996

Of the 982 occupied (1 or more workstations) facilities that reported:

- a) **Small Size Facilities**
503 facilities (51 percent of occupied facilities) are staffed with 15 workstations or less. These facilities average 326 sq ft per workstation.
- b) **Large Size Facilities**
Conversely, 50 percent of the total staff workstations are housed in 68 facilities (7 percent of facilities). These facilities are all staffed with greater than 160 workstations and average 221 sq ft per workstation.
- c) **Medium Size Facilities**
The remaining 393 facilities (40 percent of occupied facilities) house 16 - 159 workstations. These facilities average 269 sq ft per workstation and represent 46 percent of the total occupied square footage reported.

Figure 7 Facilities by Size



Source: 2009-2015 Six Year Facility Plan: Alternatives Document

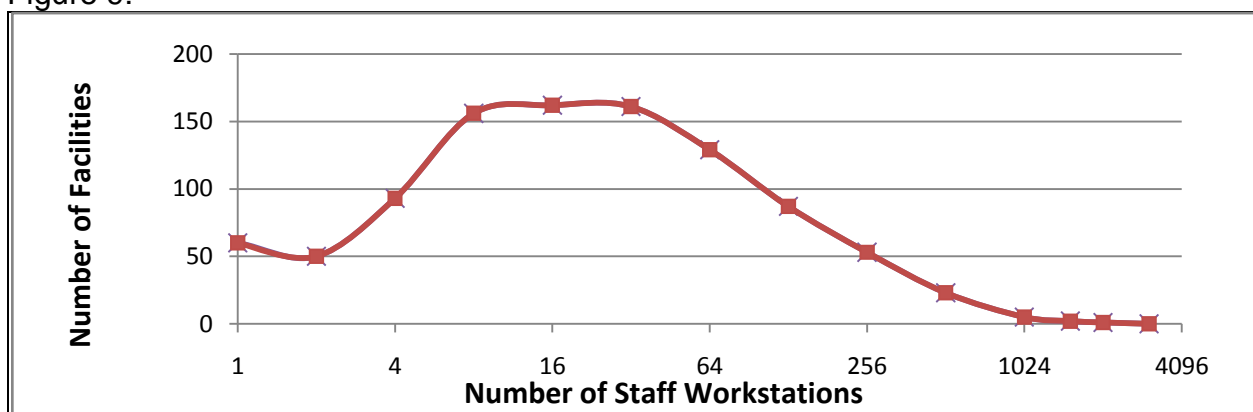
Given that the majority of state staff occupies medium to large facilities, it would seem that the effort to more strictly apply the space allocation standards would be most effective if space allocation standards are focused on this group. Trying to pin down standards for progressively smaller agencies may yield diminishing returns. However it is also clear that the smallest facilities also represent the least efficient use of space and this bears some further investigation.

Figure 8



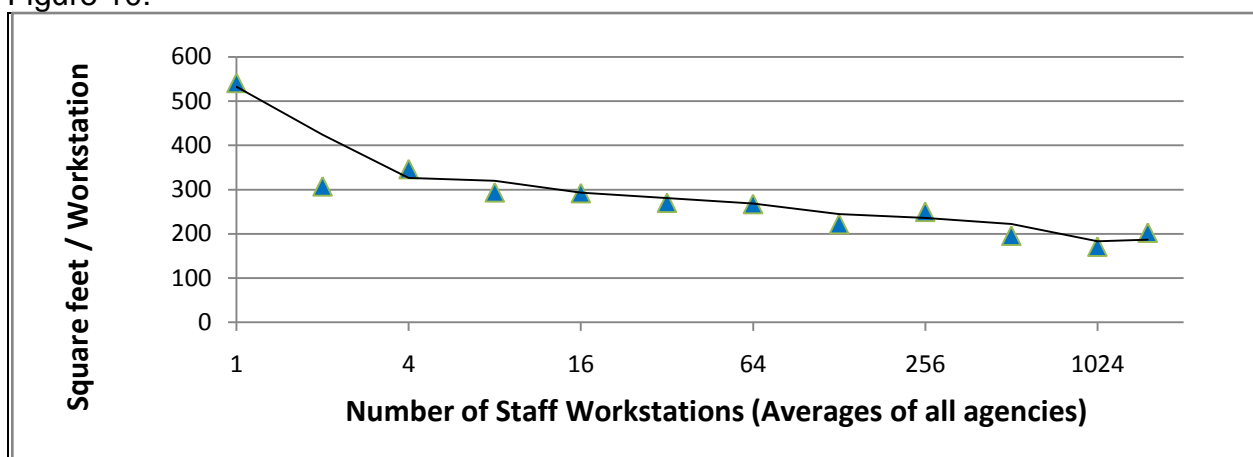
Source: 2009-2015 Six Year Facility Plan: Alternatives Document

Figure 9:



Source: 2009-2015 Six Year Facility Plan: Alternatives Document

Figure 10:



Source: 2009-2015 Six Year Facility Plan: Alternatives Document

The data reveals that while larger facilities (160 or more workstations) do tend to have less space allocated per person, that there are exceptions to this trend. At least 23 percent of the large facilities surveyed exceed the allowable range. About 48 percent of medium size facilities and 54 percent of small facilities also exceed the allowable range. To understand the factors behind this trend it is necessary to take a more detailed look at the specific types of programs that regularly exceed space allocation standards.

A closer look at the facilities that exceed space allocation standards reveals additional trends. Of the reported facilities, 55 agencies reported facilities that exceed space allocation standards (i.e. greater than 261 square foot per person). This includes a total of 433 facilities.

2. Department of Social and Health Services (DSHS)

It is interesting to note that while the DSHS is generally regarded as using space efficiently to meet budget requirements, they reported the largest portion (25 percent) of space exceed the allocation standards. This particular agency has a number of sub programs so and it may be possible that some of this apparently excess space may be

subleased to different agencies. A more detailed review of the spaces reported by DSHS as well as their various program types and space utilization is warranted.

3. Other Agencies

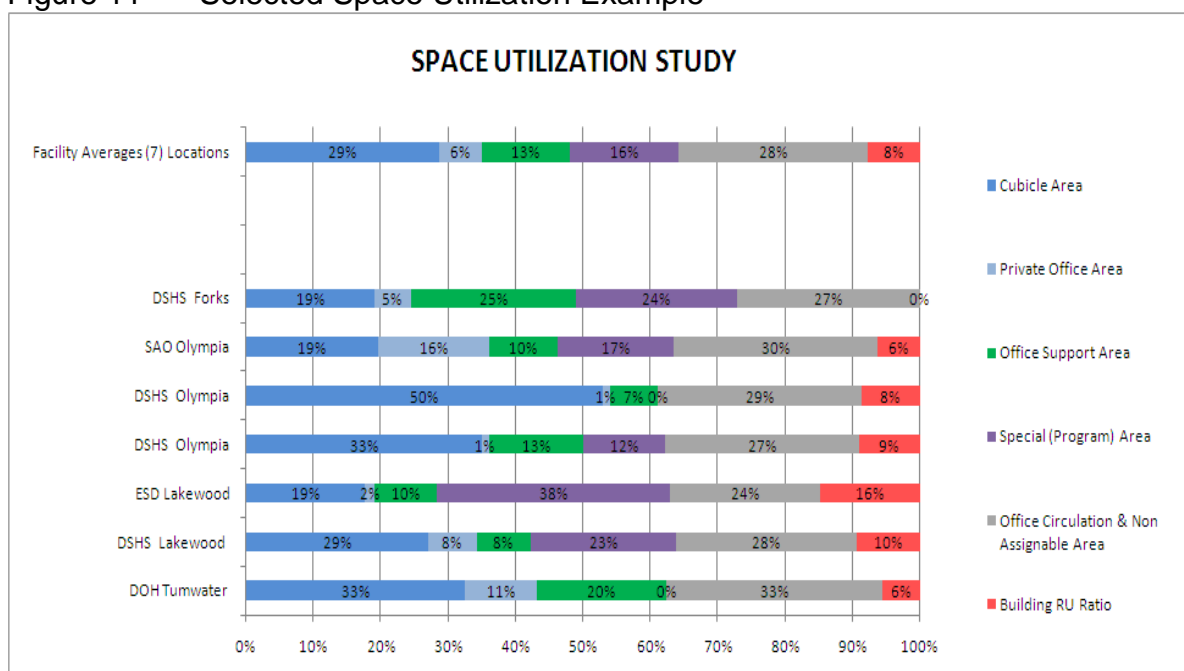
Many of the agencies that have space that exceeds the Space Allocation Standard have very specific program requirements that are unusual for government office facilities. Examples include:

- **Washington State Patrol** requires a high number of private offices, various evidence storage facilities, weapons lockers, laboratories, sound proof interview rooms.
- **Department of Transportation** requires extensive vehicle and storage and maintenance facilities, as well as equipment and material storage.
- **Department of Revenue** requires extensive file storage capabilities.
- **Department of Licensing** locations that serve the public typically have large waiting areas that may fill more than half of the facility.
- **Department of Information Services** has many locations (often unmanned or with a couple workstations) that are almost exclusively data centers or communications equipment nodes.
- **Department of Corrections** facilities typically have classrooms to meet rehabilitation programming requirements.
- Agencies that regulate natural resources such as **State Parks and Recreation, Fish and Wildlife, Natural Resources, etc...** often have laboratories, mudrooms, equipment storage.
- Legal and Executive agencies such as the **Attorney General** and the **State Auditor** typically require extensive private offices for most of the staff.

It should also be noted that nearly half of the agencies reporting space in excess of the standard are commissions or hearings boards that typically have a small number of staff and large hearing room spaces in their program. While these agencies tend to be small, many occupying single facilities, the total area occupied by this group is nearly half a million square feet. Co-location may be an effective way to provide such groups with large hearing rooms they require in a cost effective manner.

Another area of study was the actual utilization of space within the leased facilities. Figure 11 describes the results from reviewing seven projects.

Figure 11 Selected Space Utilization Example



Source: Lease Inventory System; Project Files

Additional Research

In addition to previous research, a questionnaire was distributed to a number of agencies, representing different types of functions, different sizes and different service delivery methods. (A copy of the questionnaire is located in **Appendix D**).

The objectives of the questionnaire were to:

- Obtain a description of the agencies' practices
- Identify difference in agencies' approaches
- Identify "outliers" and why

Based on the data received, a few of the agencies have developed their own space standards, mainly reflecting their sense of unique program identity or mission. In general, these agency standards do not appear to supplant the state Space Allocation Standards as much as add more detail as it relates to the agencies' mission.

As part of the attempt to understand the how the represented agencies square foot usage compared to the current Space Allocation Standard of an average of 215 rentable square feet per person, data from agency facilities was compiled and "outliers" from the standard were identified. The diagrams contained in **Appendix E** demonstrate an attempt to identify space utilization trends within various agencies. The horizontal axis on each diagram represents square footage per workstation. The vertical axis demonstrates the portion of agency staff housed.

The appearance of "hills and valleys" indicates trends that may be closely linked to types of programs within the agency. Agencies that have diverse types of programs

will tend to have various ranges of utilization while agencies with more homogenous programs will tend to have a single range of utilization.

As expected, the smaller facilities, less than 5,000 square feet appeared to have numerous outliers, but it appeared that most of the cause of that lays with market availability in the small towns where most of these facilities are located, as well as the obvious reluctance of lessors unwilling to demise their space to accommodate a smaller footprint. The adage seemed to be—“take what you can get”.

A number of the facilities with significant space over the standard were identified as sites that have a large component of “public usage”. That is, these sites were delivering services to large segments of the population that appeared on site. Sites such as Community Service Offices, WorkSource Centers etc. have a large component of public space. However, it was harder to discern what the utilization was of the staff space. Further study is needed to sort out which elements of such facilities should be following the standard and which cannot.

It should be noted that these diagrams in Appendix E only demonstrate these trends at a very high level. To gain a deeper understanding of the factors that lead to these trends it would be necessary to review that space utilization of specific locations in detail.

In addition, it is clear that agencies which have “outliers”, such as Community Services Offices or Work Source or Work First Centers have developed guidelines for these unique activities, generally in the form of allowable ranges of square feet. For example, The Employment Security Department (ESD) has square feet guidelines based on office type:

Figure 12 ESD SF Guidelines

<i>Office Type</i>	<i>Square Feet Guide/Person</i>
Headquarters or similar office	215 SF
Work Source or Work First	350 SF – 385 SF
Telecenter	215 SF – 235 SF
DTO Offices	215 SF – 250 SF

Source: ESD Facilities

ESD requires that any internal request for space in excess of 215 rentable square feet per person has to be reviewed by ESD’s Facilities Manager

One option that should be explored is to isolate the unique space needs of service delivery programs and other special programs from the types of spaces that can be easily standardized. This would allow the standard to be more consistently applied as well as present an opportunity to identify unique needs of various agencies and programs and to see if they too can be somewhat “standardized” differently.

Open Office Plan Approach

A number of state agencies have been successful in moving toward more open office workstations vs. private closed offices. The Department of Natural Resources (DNR), for example, embarked on the development of an agency ten year “Facility Master Plan” in October 2008 to establish a framework on which future planning decisions were to be made. In determining critical needs for facilities, the Master Plan also was to develop a consistent approach to determine space needs and to set standards to ensure that all DNR facilities meet a consistent level of space utilization and efficiency.

The Master Plan objectives were:

- To pursue balance and equity in the assignment of space for similar purposes.
- Achieve the optimum use of space with minimum cost to the Agency.
- To correctly and adequately allocate space for designated uses.
- To record and monitor the character, size and quality of the components of the facilities the DNR occupies.
- To accommodate changes in staffing and technology needs in a cost effective manner and appropriately measure and plan for future facility needs.

An “open office” policy utilizing universal workstation design was adopted as the basic space allocation approach. The space standards were applied based on what an individual required to function:

- Supervisor Dedicated Workstation (SDW) - These workstations are assigned to specific individuals with supervisory duties.
- Dedicated Workstations (DW) – These workstations are assigned to specific individuals.
- Shared Workstations (SW) - These workstations can be assigned to two or more individuals, but used by only one person at a time.
- Transient Workstations (TW) – This is a work surface with a desktop and/or docking station that anyone can use.
- Community Space (CWS) is defined as anywhere with a table & chair i.e. lunchroom, break room, conference room or other common / shared area.
- Dedicated Work Areas (DWA) – This is a shared work space with program specific functions.

With these standards in hand, DNR assessed each of its facilities to determine how these standards could be applied. In particular, unoccupied work stations that were assigned to employees during working hours were evaluated in order to determine the feasibility of shifting to shared workspaces. The results after almost three years are:

- Closure of 16 leased facilities
- Absorption of 72 affected staff from these facilities into existing owned facilities
- Reduction in leased space of 17,547 SF
- Cost savings of \$246,540 for the biennium

Justification for Private Offices

A few state agencies try to keep to a 10 percent private office ratio by either allowing only a certain level of employee to occupy private enclosed offices or requiring a “justification” for such private offices. The Department of Health (DOH) has been very successful at keeping the private office ratio to 10 percent as encouraged in the Space Allocation Standards Manual. How DOH assigns private offices is described in Figure 12.

Figure 12 DOH Assignment of Private Offices

Level	Position Title	Square Feet
Level 1	Secretary	420
	Deputy Secretary	280
	State Health Officer	280
Level 2	Assistant Secretaries	280
	Chief Information Officer	280
Level 3 (as defined by Level 1 and 2 and who report directly to Level 2)	Manager	168

Source: DOH Facilities

- The Assistant Secretary for each division determines who below level 3 will have a private office if offices are available after 10 percent agency allocation
- The total number of offices will be based on 10 percent of agency staff population

The Exemption Process

The purpose of the exemption process as identified in RCW 43.82.010(2) is to recognize and track unusual or exceptional space requirements that some agencies may have. It is likely that these spaces may involve program requirements that GA and OFM cannot directly apply a standardized set of metrics. The current Space Allocation Standard Manual references a “functional programming allowance” but does not provide guidance for analysis of such requirements or define the Exemption request process.

The exemption process should include an analysis of the requested space that outlines the specific program need, the amount of space requested and establish a set of metrics that can be related to other variables such as number of workers at the facility, case loads as well as physical storage requirements.

Space Programming

One of the critical elements of housing state agencies is the research, analysis, planning and decision making process that defines the space to be designed. This step is essential to correctly capturing agency program requirements in terms of space, adjacencies and operations.

A factor that has hampered GA’s ability to apply standards consistently is that programming is generally performed by the agencies. However, not all agencies have staff with the ability to compile this information properly—in fact, very few do. Even with little or no capacity, agencies rely on their own “planning” vs. fully engaging GA in the programming process. Agencies have explained this is to avoid paying an hourly

consulting fee. When project information is transmitted to GA with incorrect or incomplete programming detail, the resulting plan and its efficiency is affected.

Thus the timing of GA's involvement with a project should be evaluated in order to ensure that efficiencies can be identified as early as possible in the process.

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Appendix A

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APPENDIX B

SUMMARY OF FACILITY EFFICIENCY STANDARDS FOR PUBLIC SECTOR ORGANIZATIONS IN OTHER STATES AND COUNTRIES

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Alabama	Alabama Department of Finance, Division of Services, Office of Space Management Office of Space Management	No	N/A	N/A	N/A	N/A	N/A	
Alaska	Department of Administration, Division of General Services Department of Administration, Division of General Services, Leasing Section State of Alaska Space Allocation Standards	Yes	‘open office’ concept is policy, but no ratio		35 percent added to usable area for staff (note- actual circulation varies from 15-35 percent) Reduced to 15 percent if using systems furniture		Mid level private office assignments require justification and funding by Agency.	Facilities with fewer than ten full time positions may require more space than allowed by the standards; however, the Office Space Standards shall be applied to the extent feasible. Private offices SF sizes are 300 Executive; 200 Director, Division Director, Judge, Commissioner (field); 150 Asst. Director, Physician, attorney, Deputy Commissioner (field), Hearing Officer; Managers; 80 – 100 Professional Staff; 64-80 Para-Professional technical staff; 80-100 Clerical Supervisor.; 48-75 Clerical.
Arizona	Department of Administration, General Services Division Building and Planning Services: Private Sector Leased Office Space	No	N/A	N/A	N/A	N/A	N/A	Office leasing has been outsourced. No standards appear on website.
Arkansas	Arkansas Building Authority (ABA), Real Estate Services Section ABA Minimum Standards and Criteria NW Arkansas Commercial Property Division	No	N/A	N/A	N/A	N/A	N/A	Commercial Property Division has pictures of 18 “agents”. The Standards and Criteria manual appears to cover an array of leasing requirements, design fee thresholds, and design and construction criteria.
California	Department of General Services, Professional Services Branch Real Estate Leasing and Planning Section Design Services + State Space Allowances Standards	Yes Policy is in SAM and space is allocated by position type.	No	No	40 percent	No	Modifications to agency space allocations must be reviewed and approved by RESD.	Private offices range from 150 – 300 SF for attorneys, managers, administrators and executive; Conventional Furniture (CF) allowances and Modular (MSF) SF Allowances from 112 to 150 for middle Managers, 96 to 125 for supervisors of 10 or more; 96-110 for supervisors under 10; 80-100 for attorneys, architects, engineers, 64-100 for working professionals; 64-75 for Clerical Supervisors; 40-75 for Clericals.
Colorado	Department of Personnel and Administration Real Estate Programs Policy and Procedures	Being Revised-- REP may report statistical data on space use efficiency to Legislature	N/A	204 RSF/person is “efficiency goal”; 232 RSF/ person is “guideline”	N/A	N/A	N/A	Anything over 232 RSF/person but under 291 RSF/ person requires approval by Division Director of unit occupying the space. Anything over 291 RSF/ person requires approval by Executive Director of Department occupying the premises.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Connecticut	Department of Public Works, Leasing and Property Transfer Space Standards Manual	Yes	No	No	28 percent added to employee work area and support areas subtotal	Categories are General, Conference, Training, Storage/File, Miscellaneous	250 SF (up to 75 FTE); 225 SF (up to 250 FTE); 200 SF (more than 250 staff)	Space Standards (November 2005) contains 2 versions of the Request for Space Forms: Standard and Judicial. These standards are applied as a guideline with ranges of usable SF per person in 3 categories: (clerical/administrative 64 and 75-110 SF, professional 80 SF, and managerial 150 SF/ executive 225 & 320 SF). Support space template includes column “hours use per day” and # of rooms currently required; # of rooms total in 3 years.
Delaware	Office of Management and Budget, Division of Facilities Management Space Standards Summary Lease Space Procedures	Yes	No	No	No	No	No	Space allocation is measured via pay grade with the exception of the Cabinet Secretary/Agency Head Commissioner level. Work spaces range from 50-235 SF per person on a usable basis and 54 – 238 on an “actual SF” basis. Not posted on website is the ‘space needs analysis’ template. This is prepared by the Office of Management and Budget.
Florida	Department of Management Services, Real Estate Development and Management Division Lease Management	Yes	Encourages 80 percent offices vs. 20 percent cubicles	180 USF/FTE	35 percent work spaces 30 percent support spaces		If an agency request for space seems high, DMS asks agencies to provide written justification.	The state average rent rate stayed at \$17.18 per leasable SF for the past 3 years. DMS maintains a 3 percent vacancy rate in the leasable buildings in the DMS Facilities pool. This is tracked by distinct spaces and not by vacant seats. When agency request for support space or overall size seems high, DMS asks agencies to provide written justification. Final lease proposals are reviewed not only for compliance with space standards but also for appropriateness of tenant improvements being charged to project.
Georgia	State Properties Commission, Leasing Space Management	Yes	No	Average of 200 SF is “goal”—for planning purposes	No	No		Space standards matrix lists 8 codes for position category types and associated allocated SF as well as Open and Closed work spaces. Areas range from 36 SF for hotelling visitor space to 300 SF for the highest position type. Four of the eight job types are allocated enclosed spaces while one of the remaining four may occupy both closed and open areas.
Hawaii	Department of Accounting and General Services, Public Works Division Leasing Services Branch	Yes	No	No	30 percent for interior circulation	Justification to include metrics		Detailed information is requested to justify support areas from number of clients per day, time spent per client, current reception area size and furniture in reception area, log of usage for conference rooms, library shelves, number and types of documents, users of library, inventory of items to be stored and intervals for storage.
Idaho	Department of Administration, Division of Public Works, Leasing and Property Acquisition Facility Use Standards	Yes	No	No	25 percent if predominantly open office; 30 percent if not.	Conference rooms to be occupied 15 hrs. or more/week		Hard walled offices from 144-250 SF for Department Director to Bureau Chief; open office areas from 70-144 for field staff in office less than 60 percent of the time to Regional Division manager. Restrooms are assumed to be part of circulation added.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Illinois	Central Management Services Capital Development Board	No	N/A	N/A	N/A	N/A		
Indiana	Department of Administration, Real Estate Leasing Real Estate Leasing Manual 2009	Yes	No	200 SF/ employees is goal	15 percent of staff and support areas plus 10 percent for 'horizontal' circulation:	Conference/ public or training areas = 20 SF per person	Any agency requesting more than 200 SF per person is required to submit justification for approval	Net Space Allocation Formula provides for between 60 – 300 SF per person in keeping with 'staff category'. The total workspace areas plus support space is arrived at for Subtotal #1. This is multiplied by .15 to arrive at Subtotal #2. This is multiplied by .10 to arrive at Subtotal #3. The 3 combined are the total allowable SF.
Iowa	Department of Administrative Services, General Services, Space Management and Leasing Division Office Space Standards	Yes	No	No	No	2 conference room sizes; otherwise no detail.	No	Department Director is allowed 300 SF hard walled office; Deputy Director – 230 SF, Gubernatorial Appointee – 160 SF; Division Administrator – 140 SF; Bureau Chief – 100 SF; Professional/technical support – 80 SF; Technical/clerical support – 64 SF; data entry; field support – 25-48 SF.
Kansas	Department of Administration Office Space Standards	Yes	Top 4 levels allocated private offices.	210-250 USF 7 level hierarchy.	No	No	No	Cabinet level Secretary 300-400 SF; Agency Administrator 180-225 SF; Department Manager – 175-185 SF; Supervisor/Senior Professional 110-130 SF; Administrative staff 60-80 SF; Junior Professional 50-60 SF; Intern/Data Entry 45-50 SF.
Kentucky	Finance and Administrative Cabinet, Division of Real Properties Facilities and Support Services	No	N/A	N/A	N/A	N/A	N/A	
Louisiana	Division of Administration, Office of Facility Planning and Control Real Estate Leasing	No	N/A	N/A	N/A	N/A	N/A	
Maine	Department of Administrative & Financial Services, Bureau of General Services Leased Space	No	N/A	N/A	N/A	N/A	N/A	Bureau of General Services manages over 275 leases across the state, comprising of approximately 1.6 million square feet of space
Maryland	Department of General Services (DGS), Office of Real Estate Maryland Office Area Standards Office of Real Estate	Yes	No	No	20 percent	SF/person for conference, interview, training, and reception areas,	No	Secretary – 300 SF; Deputy Secretary 250 SF; Judge, Exec. Director, Assistant Secretary, Division Chief, director – 200 SF; Branch Heads, Assistant Division Chief, Assistant Directors – 150 SF; Attorneys, Doctors, Field Supervisors – 150 SF; Professional supervisory (private office) – 110 SF; Professional, non-supervisory (private office) 90 SF; Professional supervisory (open office) 90 SF; Professional (open office) 70 SF; Technical personnel, field staff – 50 SF; Secretary professional (shared office) 70 SF; secretary, word processor, clerical (open office) – 50 SF.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Massachusetts	Division of Capital Asset Management (DCAM) Massachusetts Administration and Finance, Office of Leasing and State Office Planning	Yes	No	Standard for a typical office ranges between 130 to 150 square feet per person.	35 percent x usable SF for staff and other office area			DCAM Program Worksheet 1A: Specifications combines existing lease summary information with agency programming requirements. Worksheet 1D: Staff Areas provides for space allocation by personnel categories. Agency Head 220 SF; Senior Manager – 150 SF; Senior professional 63-77 SF (differentiated by conventional and systems furniture); Professional 42-56 SF; Support Staff 42-56 SF; Work area 35-46 SF. This total is usable SF. Page 2 of this worksheet quantifies support areas. The subtotal of staff areas is added to the subtotal of support areas then multiplied by a 35 percent circulation area. Utilization rate is calculated by dividing the Usable Area by the total number of staff occupying that space.
Michigan	Department of Management and Budget, Real Estate Services Division Michigan Department of Management and Budget	Yes	No	200-250 RSF	35 percent	N/A	Agencies requesting variance from standard must submit written justification.	To send space standards as not available on DMB website. Staff whose grade level is 17 (directors and above) are allocated hard walled offices, otherwise staff are allocated cubes. Outside of space standards, some historic buildings (i.e. the Cadillac building) were built for different purpose and original design is inefficient. This state does not have in-house architects. The state has a furniture standard and highly competitive contract for furniture provides space planning services.
Minnesota	Department of Administration, Real Estate and Construction Services Real Estate Leasing Guide Customer Guide to Space Planning	Yes	No policy Encourages 10 percent/90 percent	Varies – see comments	No specific SF guidelines for circulation. It is determined by space available, features of the space, work flow requirements, and furniture layouts. (Fall back is 30 percent)	Preliminary estimate of support space is based on 125-175 SF/person for low support space needs; 175-200 SF/person for average support space needs, and 200-230 SF/ person for high support space needs		Space is allocated based on the combination of people needing dedicated assigned space and the number of “internal mobile workers” who do not need a dedicated assigned space and the number of external mobile workers. The result, combined with the low, medium and high support differentiation guiding the programming discussion on options that will best meet the space needs of the group.
Mississippi	Department of Finance and Administration, Bureau of Building, Real Property Management Space Evaluation Form	Yes			20 percent to staff subtotal; another 15 percent is added to staff + support SF.	Waiting area to be sized for average occupancy for typical 1 hr. period.		Conference area is based on average occupancy.
Missouri	Office of Administration, Division of Facilities Management, Design, and Construction Space Standards Manual	Yes	No	No	30 percent (for staffing and support area)	Formula for conference room, employee restrooms and auditorium.	Unclear	Workspace standard is aligned with Job Class Title and pay Grade. The criteria used to determine functional issues for individual footprints are: paperwork/task, computer/equipment, work surface use, filing/reference and privacy needs, all measured by high, moderate or low usage. Conferencing measured by either answering yes with number of users, or no.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Montana	Department of Administration, General Services Division General Services Division	No	N/A	N/A	N/A	N/A	N/A	
Nebraska	Department of Administrative Services (DAS), State Building Division DAS Building Division	No	N/A	N/A	N/A	N/A	N/A	
Nevada	Department of Administration, Division of Buildings and Grounds Dept. of Administration, Division of Buildings and Grounds, Leasing Program	No	N/A	N/A	N/A	N/A	N/A	
New Hampshire	Department of Administrative Services, Bureau of Planning and Management Administrative Rules Interior Space Planning Standards	Yes/No	N/A	N/A	N/A	N/A	N/A	The Space Planning standards depicts common workspace layouts without a space allocation worksheet or any description.
New Jersey	Department of the Treasury, Division of Property Management and Construction (DPMC) Space Allocation Request Form	Yes	No	No	Built into form	SF/unit	No	The Standard Space Allocation tables take into account the needs of a small office as well as the efficiencies of a large office. There is no Standard Allocation for Special Use facilities or sites that do not fit into the categories of either Administrative or Client Service. Examples of Special Use facilities are laboratories, motor vehicle agencies, unemployment offices, courtrooms, State Police Barracks, field operations, etc.
New Mexico	General Services Department, Property Control Division Property Control Division + RFPs Links to Space Needs Questionnaire	Yes/No	No	No	No	No	No	Questionnaire tallies job types and SF assigned to each but unclear where the list is needed to populate the SFs. This state has an outsourced model.
New York	Office of General Services (OGS), Real Estate Planning and Development Office of General Services/ Real Estate Services	No	No formal policy, but heavy encouragement	N/A	N/A	N/A	N/A	Private offices are allocated based on management level and # of employees supervised. In open office plan, some positions allowed larger cubicles.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
North Carolina	Department of Administration, State Property Department of Administration Services for Government	No	N/A	N/A	N/A	N/A	N/A	
North Dakota	Office of Management and Budget, Central Services, Facility Management Division Procedures to Completing a State Office Lease	No	N/A	N/A	N/A	N/A	N/A	
Ohio	Department of Administrative Services, General Services Commercial Leasing	Yes	No formal policy, encouragement	250-300 SF/person	N/A	N/A	Exceptions requests reviewed and approved by bureau director	Space is allocated based on job title/position, with 9 levels. Differentiates between conventional and systems furniture.
Oklahoma	Department of Central Services, Office of Facilities Management Leasing and Space Standards	Yes	N/A	150 USF/FTE	N/A	Frequency of use and availability of other private office or conference areas.	Agencies must submit an item-by-item justification if request exceeds guidelines.	Support area sizing appears to be a combination of allowable metrics and usage, or other programming information. Private offices are provided when there is a ‘demonstrated need’ and range from 125 to 300 SF in size. There are 10 categories of staff type with associated space allocation. This state has differing space allocation for modular vs. conventional furniture.
Oregon	Department of Administrative Services, Facilities Division, Leasing Section Space Standards Policy Manual	Yes	Policy, no ratio	250 USF/FTE	Systems furniture 45 percent; 30 percent for conventional; 30 percent for support and 30 percent for special program space	SF number and in some cases, additional SF based on # of people	No space allocation to exceed 250 SF per FTE without written justification. Some type of support space and special program space require justification.	Staff area space allocations are based on 9 categories of positions -the first 5 categories may have private offices; the last 4 categories are open work areas with a range of SF depending on whether conventional or systems furniture. Twice per year agencies are surveyed regarding vacancy to the seat level.
Pennsylvania	Department of General Services, Bureau of Real Estate PA eMarketplace Request for Space Allocation	Yes	No	No	35 percent applied to combined staff area + support areas	SF per Person meeting for conf. and reception areas.	No	Based on levels of management/position: Executive I – 425 SF; Executive II – 255 SF; Senior Manager – 255 SF; Mid-Manager/private office – 150 SF; supervisor/technical – 96 SF; Analyst/admin./secretary – 64 SF; Clerical/field – 48 SF.
Rhode Island	Department of Administration, Operations Management Operations Management	No	N/A	N/A	N/A	N/A	N/A	

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
South Carolina	Budget and Control Board, Division of General Services, Real Property Services Leasing Procedures and Forms	Yes	No	No	15 percent applied to usable area	No	Justification required for offices for staff under pay range 6.	Beta testing an online space request that includes a space allocation worksheet or an “Office Space Calculator that is 5 pages long, Contents include: introduction, agency contact info, high level programming info, other agency requirements, current premises recap, and Certification of Agency Director who must sign off on form. State has a typical space allocation worksheet in their leasing manual. Director – 200 SF; Assistant/Deputy/Program Director – 175 SF Professional – 150 SF; Clerical – 100 SF
South Dakota	Bureau of Administration, Space Management Office Space Management	No	N/A	N/A	N/A	N/A	N/A	Agencies request space and request is reviewed and recommendations provided for approval for director of Bureau of Administration
Tennessee	State Building Commission, Department of General Services By-Laws, Policy and Procedure State Building Commission Division of Real Property Admin. Forms and Worksheets Facility Revolving Fund	Yes	No	250 RSF 225 USF	30 percent applied to both workspace and support space		Written justification for any request that is over the norm. Exec category must provide justification for private offices.	Tennessee’s Office Space Needs Worksheet quantifies staff space needs not only by job level but also by percentage of time in the office (75-100 percent, 50-74 percent, 25-49 percent, and 0-24 percent). This is used to prompt a conversation regarding the need for shared workspaces when staff spend more time in the field. Hard walled offices standards: Commissioner – 350 SF; Deputy or Asst. Commissioner – 225 SF; Director of Statewide Functions – 150 SF; Executive – 120/150 SF Open office furniture systems: Management – 120/150 SF (96 SF typical); Staff – 64/80 SF (64 SF typical); Clerical, support – 36/48/64 SF; Field/Hotelling (in office less than 25 percent of time) – 36/48 SF; Student or volunteer – 36/48 SF
Texas	Texas Facilities Commission, Facilities Leasing Texas Facilities Commission Space Planning Principles and Guidelines	Yes	No	153	10-15 percent	25 percent-35 percent added to 153 SF/staff member		Texas plans for space for 5 years of ‘projected departmental growth’ from date of occupancy of improved space. Space is allocated by Full Time Equivalent.
Utah	Department of Administrative Services, Division of Facilities Construction and Management Division of Facilities Construction and Management	Unclear	Open space concept is policy, but no ratio. Private offices assigned based on function and justification re: specific criteria	No average rate, but specific space standards are based on positions based on function	30 percent - 35 percent			
Vermont	Agency of Administration, Buildings and General Services Dept of Building and General Services Space Request	No	N/A	N/A	N/A	N/A	N/A	Space request is very simple with little information.

States	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
Virginia	Department of General Services, Division of Real Estate Services (DRES) Division of Real Estate Services Space Standards for Commonwealth of Virginia Office Space	Yes	No	198 USF (does not apply to agencies with large support or special needs spaces)	30 percent applied to workspace area when # of modular spaces is greater than the # of offices; 35 percent applied to workspace area when # of offices is greater than the # of modular workspaces.	30 percent	Space requests that exceed the target are review by the Division Director for approval. Agencies must submit certification signed by director that they have funding for the requirement.	Private offices: Agency or Dept. Director confirmed by General Assembly – 196 SF Agency or Dept. Director – 150 SF Asst. Director & Confidential Mgmt. staff – 120 SF Open office: Professional staff supervisor – 96 SF; Professional staff and support admin. Supervisor – 64 SF; Contractors / auditors – 48 SF Field staff, floating staff, receptionist, and support admin., volunteers and Interns – 48 SF
Washington	Department of General Administration Office of Financial Management	Yes	Formal policy 10 percent/90 percent	215 RSF/person	40 percent		Exemption requests must be submitted to director of GA for approval. However, overage has generally been worked out during programming.	
West Virginia	Department of Administration, General Services, Leasing Section General Services Leasing Legislative Rules	No	N/A	N/A	N/A	N/A	N/A	
Wisconsin	Department of Administration, Division of State Facilities, Bureau of Portfolio Management State Lease Information Current Space Needs	Currently under review Based on job title/position	Policy, but no ratio	NA	40 percent	Assigned by SF	Exception requests submitted in writing.	Private offices: Executive – 225 SF/Administrator – 192 SF Managers – 160 SF Managers & Supervising Professionals – 144 SF Open office: Supervising professionals – 96 SF (modular) / 100 SF (conventional) Architecture & engineering – 72 (modular) / 81 SF (conventional) Other private offices- 120 SF Open workspace-72SF - 96SF
Wyoming	General Services Division, Administration and Information, Facilities Operations General Services Facilities Operations	No	N/A	N/A	N/A	N/A	N/A	Website is limited in search function.
U.S. General Services Administration (GSA)	Public Building Service, Office of Portfolio Management, Office of Real Estate Acquisition Real Estate Services	Yes, but moving away from “fixed” standard	Open space concept as policy, but no ratio identified	230 RSF				GSA provides national leadership, policy direction, and standards in the areas of architecture, engineering, urban development, design, fine arts, historic preservation, construction services, and project management. Conducts workplace studies. Annual performance metrics Significant emphasis on Alternative Work Strategies

States/ Provinces/ Countries	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
<u>Canada</u> Federal Government	Public Works and Government Services	Yes	No policy, but open workspace encouraged	Maximum for open workspace workstation is 80 SF; private enclosed offices range from 108 SF to 301 SF	N/A	Support space is allocated based on population of the floor		Feds use “integrated workplace Solutions” which allocates space based on functional requirements of workers and amount of time they spend in the workplace. Work profiles reflect leadership (108 SF to 301 SF), fixed (need to be at desk-48 SF to 80 SF), flexible (away from desk at least 40 percent/day-32 SF to 40 SF), free address (do not need an assigned workstation-16 SF to 20 SF)
<u>Canada</u> British Columbia	Ministry of Labor & Citizens Services Shared Services, Accommodation Branch	yes	Policy No ratio Must meet “private office criteria” before assigned private office	Base is 70 SF /person,	Open area workstations = 35 SF /workstation; Private offices of 120 SF = 25 SF /office; private offices larger than 120 SF are assigned 16 percent of enclosed area	Support space is generally assigned based on # of employees	“Deviations” from functional criteria must be reviewed and approved by Deputy Minister	While base is 70 SF/person, task-oriented work such as data entry = 50 SF/person, 100 SF/person for multi-task work, receiving visitors, and potential supervisory responsibilities. Private offices are 120 SF/person to 150 SF/person if meet private office functional criteria.
<u>Canada</u> Alberta	Department of Infrastructure, Realty Services	No	No	N/A	N/A			Space is allocated based on 6 functional levels, and broken down into: Macro standards-for planning purposes (ranges based on functional group = 125 USF/person in open workspace to 375 USF/person in private office. Micro standards for conventional furniture and micro standards for systems furniture. Review process is at ministerial level.
<u>Canada</u> Manitoba	Department of Infrastructure and Transportation, Accommodation Services	No	No policy, but open workspace encouraged	Base is 72 SF /workstation (module)	N/A		Justification required for “deviation” from standard workstation module, signed by agency’s CFO and Deputy Minister.	9’ x 8’ module workstation is the basis. Private offices range from 120 SF to 200 SF.
<u>Canada</u> Ontario	Ontario Department of Infrastructure Ontario Realty Corporation	Yes	Open workplace policy No ratio	200 RSF/person for actual lease 180 USF for planning purposes	Not specified, but using allocation calculation model, between 25 percent-45 percent	Support spaces and common space is included in allocation, but not special program space.	N/A	Uses “work pattern” model for assigning space: Individual “process work” = 150USF/person Individual Concentrated work = 180 USF (open workspace) Individual concentrated work = 220 USF/person (private office) Group process work = 170 USF/person (open workspace) Transactional Knowledge Work = 115 USF/person (shared work space)

States/ Provinces/ Countries	Real Estate Authority and Related Link	Space Allocation Standard and/or Policy	Open Office Approach Office/Cubes Ratio	Average SF Goal	Circulation Factor	Support Space Allocation	Exemption Process or Exception Process or Justification Requirement	Comments
<u>Canada</u> NW Territories	Public Works and Services, Facility Management	No	No policy, but attempt to limit enclosed private offices to 45 percent of total workstations on a floor	No Space is allocated on # of FTEs: First 5 X 246 SF, Next 5 X 195 SF, Remaining X 185 SF	25 percent	Suggestion for smaller support space so that it can be used as workstations or team space	Deputy Minister of agency is required to “certify” to Deputy Minister of PWS that space requested is actually “required” by agency. Funding needs to be available.	Swing space is allowed if occupancy is for 10 years or more (at 1 percent for each year = 10 years acquires 10 percent swing space etc.; owned space would be provided at 2 percent/year. Individual workstation space ranges from 50 SF to 100 SF, private offices from 100 SF to 240 SF
<u>Australia</u> Federal Government	Department of Finance and Deregulation, Property Management	Yes	No policy	Target for new or major remodel space is average of 172 SF /workstation		Space allocation standard includes support space		Federal agencies conduct their own leasing transactions and property management but have to comply with framework of federal guidelines, including space allocation. Agencies must submit property management plan and provide facility information data.
<u>Australia</u> New South Wales	Department of Finance & Services, Service First	Yes	Policy Private offices are to be less than 5 percent of available space or 10 percent of workstations	Target of 183 SF /person for existing space and 161 SF/person for new space	Unknown	Agency determines support space needs		Agencies are required to submit “Office Accommodation Strategy” annually. Emphasis on Alternative Work Strategies
<u>Australia</u> Victoria	Department of Treasury and Finance, Government Services Division, Accommodation Services	Yes	Policy ratio - private offices have to be less than 15 percent of total RSF.	Maximum average of 161 RSF/FTE	25 percent	Space allocation maximum does not include support space of special program space	Apart from Executive, all other requests for private offices have to be justified.	Individual allocations based on positions: Executive = 258 SF to 506 SF Manager/profession = 151 SF Professional etc = 75 SF
<u>United Kingdom</u> Central Government	Office of the Cabinet Office of Government Commerce	Yes	Policy, No ratio	Maximum of 129 SF/person	Circulation is adjusted depending upon size and age of building	Emphasis on support space facilitating alternative work strategies	Assumes some level of “negotiation” between Office of Government Commerce and agencies. OGC identifies all office buildings above 5,300 SF that exceed the standard and agencies have to provide reasons why they are over the standard	Heavy emphasis on increased density through shared space (including free address as well as team space) and other alternative work strategies

Note: States highlighted in RED were interviewed.

APPENDIX C

Survey of Other States Regarding Space Allocation

1. **Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated?
2. **Centralized vs. decentralized real estate function** – A centralized function that supports a universal standard or design philosophy?
3. **Process** – Where in your process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level.
4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual tracked against it? What metrics does your organization track?
 - a. SF/FTE
 - b. Occupancy cost/FTE
 - c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework.
 - d. Load factor
 - e. Other
5. **Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?
6. **Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? If yes, what is the process to review compliance with standard?
 - a. **Exception process:** Do you have an exception process? If yes, what does is cover (i.e. who gets a hard-walled office, the number or sizes of support areas, etc.)?
 - b. **Appeals:** If conflicts arise, what is your process for review and who decides?
7. **Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles?
8. **Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?

9. **Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
10. **Furniture standards:** Do you have furniture standards? If so, what are they?
- a. What agency procures furniture?
 - b. What do you spend annually on furniture?
 - c. Who is responsible for inventorying, storing, and redeploying furniture?
 - d. Do you have any metrics associated with furniture?

State of Florida
Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
State of Florida Dept. of Management Services Real Estate Development and Management	Space Allocation	Glenn Tedcastle	(850)488-6478	Glenn.Tedcastle@dms.myflorida.com
<p>DMS has a staff of 4 and if the Legislature passes a bill to increase centralization of leasing and related functions in DMS, Glenn Tedcastle expects staff will be expanded to 8 FTEs. (A similar bill was vetoed last year because of other elements). The current staff focuses on transactions (manager, leasing coordinator for state-owned facilities, leasing coordinator for private leases, and data entry clerk for inputting data into proprietary database DMS developed). Agencies were mandated by Executive Order to have DMS review the space estimate going into the solicitation and following to review the deal and tenant improvements before signing. Landlords provide project management, space planning, and architecture. Glenn estimates there are 80 facilities staff within other agencies.</p> <p>The state has a decentralized system in terms of real estate services, although this is changing. Last year, the Legislature passed a bill for centralization, but it was vetoed by the Governor—on other technical grounds.</p> <ul style="list-style-type: none"> • DMS currently manages 5.5 million SF of owned and 7.7 million SF of privately held leased space (42 percent and 58 percent respectively of total). • This includes 839 private leases (over \$150M in annual costs) and 132 leases within owned properties (approximately \$100M in annual costs). • There are approximately 100 transactions a year. • The leasing process (start to finish) takes 6-18 months, depending upon size. • Typical term of lease is 5 years. 				

1. **Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated? When were they last updated?
2. **Centralized vs. decentralized real estate function** – Does your state have a centralized real estate function that supports a universal standard or design philosophy or are projects tailored to the individual agency need?
The function used to be centralized and then became decentralized. Recently it is becoming more centralized. There was an attempt to bring about more centralization, but bill was vetoed (for technical reasons). Statutory authority is:
<http://www.leg.state.fl.us/Statutes/index.cfm?Mode=Viewpercent20Statutes&Submenu=1&Tab=statutes&CFID=181000722&CFTOKEN=80309738>
3. **Process** – Where in the leasing process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level? How does your process work?
Currently, agencies have to submit a business case and space request to DMS. DMS evaluates the package, but the determinant is whether the agency has the budget. If yes, then is there space in an owned facility. If yes, the agency is required (by statute) to occupy the vacant owned space. If no, then the agency may solicit space from the private sector. DMS will review the proposed lease

agreement closely and conduct value engineering. It may even encourage the agency to renegotiate. However, at this stage the decision is generally up to the agency based on the availability of the funds. Solicitation takes between 30-90 days depending upon project and market conditions. Once the agency occupies the space, it “manages” the lease and facility. On renewal, the agency will have to repeat the process. Alterations can only be done at renewal time, though the agency cannot pay for them—it is the lessor’s responsibility. An agency may offer early renewal to obtain alterations/tenant improvements. We use market trend data from Co-Star to assess whether to renew for 5 years or for less than the normal 5 year term.

DMS reviews the space allocation worksheet content at the outset of the space procurement and the layout and SF to be leased at the transactional level. The agencies have their own specifications and determine the configuration or layout. These are generally included in the solicitation document. However, most agency space that is administrative is in owned buildings where DMS sets the standard and the layout/configurations.

4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF usage tracked against it?
 - a. SF/FTE - Yes
 - b. Occupancy cost/FTE Yes
 - c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework. – *DMS asks agencies when support space seems inordinately high to provide utilization information to support their request but there is not a formalized process.*
 - d. Other? - No
5. **Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?

Florida Administrative Code requires 180 rentable SF unless the agency’s operations require more—and that is an exception process. So DMS uses 180 SF as the target for administrative space. However this may be increased per the Code, if the 180 SF is not adequate to do agency business. Support space is not included in this calculation and must be justified on a case by case basis. DMS exercises judgment based on experience of agency needs. As the number of people being planned for in state office buildings that are older increases, this is generating a parking problem. The buildings were designed originally to hold fewer people.
6. **Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? What is your process to review compliance with standards?

It is a rule, and it is required under the Florida Administrative Code.

 - a. **Exception process:** Do you have an exception process? If yes, what do exceptions cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)? *DMS ruling sticks.*
 - b. **Appeals:** If conflicts arise, who decides? *DMS*
7. **Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles?

Aim for 20 percent offices, 80 percent cubes. However, if an agency is able to stick with 180 SF per person, DMS does not attempt to regulate how agencies distribute staff space sizes within their footprint.

- 8. Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?
30 percent for support areas; 35 percent for administrative/staff areas.
- 9. Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
Options to expand are included in leases. Agencies submit an annual report on FTE count to DMS which checks for differences between annual submittals.
- 10. Furniture standards:** Do you have furniture standards? If so, what are they? *No*
- a. What agency procures furniture? --*There is a state contract, but it is up to each agency whether to use it.*
 - b. What do you spend annually on furniture? -*Unknown*
 - c. Who is responsible for inventorying, storing, and redeploying furniture? -*Agency*
 - d. Do you have any metrics associated with furniture? -*No*

State of Michigan Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
State of Michigan, Department of Technology, Management, and Budget.	Space Allocation	Jim Clark	(804) 225-3770	clarkj1@michigan.gov
<p>Background – Michigan Department of Technology, Management & Budget (DTMB) manages 6.7 million square feet of facility space with approximately 568 leases. The Director's Office provides management oversight, strategic planning, public information, legislative affairs, and budget development to the department. The Real Estate Division (RED) is responsible for preparing and maintaining a 5 year strategic plan, updated annually, covering both owned and leased facilities as well as a 5 year capital plan. Each state agency and the state's broker participate in the development of the plans.</p> <p>The real estate function at one point was decentralized for 10 years. Over time, some agencies were judicious in their use of that authority and others were not. In 2002, the function was recentralized under the Department of Management Services. More recently this agency was consolidated with Technology. In 2010 the department consisted of 15 people; 7 have since left. The brokerage contract was a way to shore up downsized staffing levels. DTMB is authorized by statute to enter into leases on behalf of state agencies with private owners for all properties procured by the state. DTMB is responsible for all leasing activities, including the leasing of state owned facilities and land. Some agencies such as DOT, DNR and Parks are exempt from this requirement for their core business functions, but are under DTMB's jurisdiction for all government type operations.</p>				

General

- Approximately 40 percent of the state's facilities are state-owned and 60 percent leased from the private sector.
- Approximately 85 percent of all leases are office space, with warehouse use being the predominant use for the rest.
- DTMB conducts approximately 150+ projects for new space or renewals annually.
- A cost-benefit analysis is used to determine whether to lease, build or buy.
- The process for renewals takes up to 3 months; new space in existing facilities between 6-12 months and for new space in planned or facilities under construction between 12-18 months.
- Typical term is for new space is 5 years and also for renewals.
- Typically leases do not have a purchase option, but DTMB is starting to include a lease purchase option in new building leases where the state is the sole tenant.
- Early termination clause are included in leases, but not restricted to lack of funding. The cancellation clause allows the state to cancel for any reason. Most clauses are 90 days. (Does not seem to affect rent costs because lessors are "desperate".)
- Tenant improvements which are funded through amortization on initial lease term or a one-time payment.

Leasing Process

A space request is initiated by a state agency. RED, sometimes in collaboration with its contract broker, procures space through a competitive bidding process, through DTMB's webpage. A summary of the responses are developed by RED, together with a recommendation to the requesting agency—which approves or rejects the recommendation.

If the recommendation is accepted, RED develops a lease which is reviewed by the agency and prospective lessor. When the lease is approved by lessee and lessor it is reviewed by AG for legal form. The lease is then reviewed and approved by the Building Committee of the State Administrative Board and then by the State Administrative Board itself. If the lease is greater than 25,000 SF or more than \$500,000 in annual base rent, the lease must be reviewed and approved by the Joint Capital Outlay Subcommittee of the Legislature. The lease is not valid until all necessary approvals have been obtained and it is then signed by the director of RED and executed. Renewals of 10,000 SF or more are evaluated to determine if a consolidation or co-location is feasible. At that time, a facility's operations and maintenance costs are also reviewed.

DTMB reviews the final cost estimate provided by lessor of build out and tenant improvements, sometimes before lease is negotiated and sometimes after work is in progress (used to be all after lease executed, but working with Construction to assess). Tenant improvements are either amortized into lease rate or paid for up front by agency. However, IT/telecom are separated from the lease rate.

Space Allocation

1. **Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated?
2. **Centralized vs. decentralized real estate function** – Does your state have a centralized real estate function that supports a universal standard or design philosophy or are projects tailored to the individual agency need?
The real estate function was decentralized for a time and was centralized in 2002. See above. While DTMB would prefer a universal standard, the agency has not been able to implement it.
3. **Process** – Where in the leasing process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level?
A space request is submitted to DTMB and space need is estimated using the 'space calculator'. DTMB determines whether the space requested can be provided using state-owned space. If so, then agency is required to occupy state owned space. If not, agency may seek space using the contracted broker or subcontractor. The agencies then work with a subcontractor of the broker for space programming. Even when an agency works with an outsourced broker and outsourced space planner or systems furniture vendor, DTMB reviews space usage closely.
4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF usage tracked against it?
The target allocation is a range, between 200-250 rentable SF/FTE. It is a range because there are a variety of functional needs. Generally, DTMB tries to reduce the amount requested by the agency.
 - a. SF/FTE – *This metric does not take into account the volunteers or contractors that are housed within state premises so do not use this metric. DTMB does not track the SF usage by group or individual project.*
 - b. Occupancy cost/FTE – *No. Do watch for the \$/SF of leased property vs. the marketplace.*
 - c. Utilization – *ratio of seats to workers based on percent of time in the office, usage of common areas, hotelling/telework. No*
 - d. Other – *Infrastructure cost/FTE*

5. **Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?
The range of 200-250 RSF is intended to provide flexibility given the inefficiency of some of the state's historic buildings. The Cadillac building was built to display a car in the lobby of each floor so circulation is overly generous. The heating system takes up space on the perimeter reducing the efficiency of layouts. If the request grows inordinately, DMB will question the program regarding the need and request a written justification. This can become political and the outcome varies.

6. **Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? What is your process to review compliance with standards?
Generally treated as a guideline.
 - a. **Exception process:** Do you have an exception process? If yes, what do exceptions cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)?
Do not have a formalized process, but proposals for exceptions require written justification.
 - b. **Appeals:** If conflicts arise, who decides?
Agency directors work it out.

7. **Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles?
Certain positions get enclosed hard-walled offices, others on a case-by-case basis. For example. Level 17 (Director level) and above reside in hard walled offices. All other staff are allocated cubes. Do not have a ratio. Attorneys and judges are given more latitude but tend to be more static as groups.

8. **Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?
35-40 percent depending on the type and age of building

9. **Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
Used to allow for growth and in some cases it resulted in the state leasing more space than is needed. Now handle growth with expansion clauses or first right of refusal.

10. **Furniture standards:** Do you have furniture standards? If so, what are they?
Yes. Again, DTMB used to control furniture standards, then it was decentralized and now being re-centralized. Three of the top furniture manufacturers are based in Michigan: Haworth, Steelcase, and Herman Miller. The procurement of furniture thus was extremely competitive. Some other states are talking with Michigan about procuring furniture. {will provide contact with Michigan OS}
 - a. What agency procures furniture?
DMB negotiates the master contract; agencies are able to procure via the master contract in keeping with state standards (furniture, finishes, etc.). When agencies procured individually, the state ended up with a hodge podge.

State leadership has critiqued DMB for why it seems that the state buys new vs. reuses existing. Although Michigan has such a cost effective rate for buying new and the cost of storing existing may exceed that, there tends to be a perception that the state should reuse what it has.

- b. What do you spend annually on furniture?
Unknown
- c. Who is responsible for inventorying, storing, and redeploying furniture?
Agencies maintain their own inventory, but DTMB is reviewing this issue.
- d. Do you have any metrics associated with furniture?
No

State of Minnesota

Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
State of Minnesota – Department of Administration Division of Real Estate and Construction Services	Space Allocation	Wayne Waslaski Bev Kroiss, Leasing Manager	(651) 201-2548	Wayne.Waslaski@state.mn.us
<p>The Department of Administration's Real Estate and Construction Services (RECS) provides a broad range of pre-planning, acquisition, disposition, leasing, project management, relocation, and space management services to facilitate facility solutions that help Minnesota state agencies succeed.</p> <p>The State owns a total of 30 million square feet in more than 5,000 buildings (does not include higher Education institutions). This real estate is managed by 20 agencies, ranging from the Minnesota State Retirement System with one building containing 146,500 square feet, to the Department of Corrections with 283 buildings with more than 5,592,818 square feet and the Department of Human Services with 192 buildings with more than 3,000,000 square feet. Additionally, RECS leases over 3.5 million square feet of space for state agencies with annual rent totaling more than \$60 million.</p> <p>The property types include office space, storage/warehouse space, workforce centers, residential facilities, hospitals, training centers, correctional facilities, environmental monitoring sites, boat slips, laboratories, driver vehicle exam stations, communication facilities, probation offices and licensing centers.</p>				

General

The Leasing Section is the State's agent for lease transactions. The Section provides comprehensive services to State agencies seeking to lease State owned and non-state owned real property.

The Space Management Section provides information to administrators and managers on space utilization and space needs to make cost-effective facility planning-related decisions. This process includes a systematic method of inventorying, allocating, planning, designing and maintaining space. The goal of Space Management is to provide flexibility, functionality and efficiency while meeting agency space requirements.

- Space under the control of DA/RECS is approximately 38 owned and 62 percent leased (approximately 400 leases annually).
- Leasing process from solicitation to occupation varies from 3 months to 24 months depending upon the amount and type of space needed and the location of the space.
- Lease terms vary from one year to ten years depending upon program needs, SF needed, funding, flexibility needed and lease terms. DA has the authority to lease up to ten years, but mostly do 5 years because the state does not want to be "locked" into a lease for so long.
- Renewal terms also vary.
- Most leases included termination clauses, and may be activated for any reason except to move to other privately leased space.
- Lease is based on gross and usable.

- Tenant Improvements are performed by the lessor and included in the rental rate unless there are unusual cost elements. (DA does not know what the typical TI costs are).
- IT and telecom wiring etc handled by the agency.
- Solicitation is conducted through advertisements and Request For Proposals. However, generally if under 50,000 SF use “market search”.
- Market rate is determined through a number of sources, such as “CoStar” or local sources.

Space Allocation

1. **Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated?

The standards were developed over 20 years ago. DA has made adjustments as necessary.

2. **Centralized vs. decentralized real estate function** – Does your state have a centralized real estate function that supports a universal standard or design philosophy or is projects tailored to the individual agency need?

DA/RECS is responsible for carrying out the leasing and space management functions for non-property owning agencies, especially the “Capitol Campus”. RECS does the leasing and space management for all properties on the Capitol Campus. Minnesota is attempting to move to an “enterprise model”. The first step has been to develop a “governance system” that would “integrate” the other property owning agencies with DA/RECS. This was initiated by an Executive Order in 2005. It directed the establishment of common standards and a common “inventory” system. In terms of governance, all 20 property owning agencies are represented on the governance board. The Executive Committee is composed of the 5 largest agencies. Another group is the METI (Minnesota Enterprise Total Infrastructure) Team.

The next step was the creation of a state “facility management [inventory] system” based on Archibus. The current modules are: Space Management, Building Operations, Fixed Assets, Facility Condition Assessment, and Leasing.

RECS has about 3 staff performing the leasing function and one space planner and a supervisor. There are also 10 project managers (architects and engineers). The actual project space planning is outsourced. Funding is provided through the “General Fund”, but DA is considering going to “fee for service”.

3. **Process** – Where in the leasing process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level?

When an agency is requesting space, it provides basic data to RECS, which then develops a preliminary or draft space program (using a specific software program).

State agencies that own their own facilities can either do their own space programming, but generally use the DA space standards. Since DA oversees construction of public facilities, it can ensure that DA standard is used for such projects.

4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF usage tracked against it?

The Guidelines rely on an 8’ x 8’ workstation and 10’ X 10’ private office.

- a. SF/FTE - DA reviews SF/FTE at project level but does not track over time.
 - b. Occupancy cost/FTE - No
 - c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework. - No
 - d. Other?
- 5. Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?
- 6. Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? What is your process to review compliance with standards?
The standard is used as a guideline. This is in an effort to eliminate staff perception of being entitled to a specific workspace when jobs change.
- a. **Exception process:** Do you have an exception process? If yes, what do exceptions cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)?
Any deviation from standard must be justified in writing. If it is for new space, a specific form is required. Otherwise, DA works with the agencies to identify appropriate level of implementation of standard.
 - b. **Appeals:** If conflicts arise, who decides?
Client agency has the “last word”. DA would rather work it out with the agency. However, if conflict persists, DA documents problem and requires another written justification and DA includes all in the “file”.
- 7. Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles? Typically 10 percent office vs. 90 percent open work space.
- 8. Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?
The circulation factor is 20 percent-30 percent...for both workspace and support space.
- 9. Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
When DA is designing the space, it will generally allow for growth that has been concretely projected. However, it does try to accommodate for flexibility in a space program. DA also includes “right of first refusal” in lease agreements.
- 10. Furniture standards:** Do you have furniture standards? If so, what are they?
Although, DA has 10 layout templates, generally only 2 are used: 6 X 8 and 8 X 8. DA operates by the principle of “people moves” vs. furniture moves.
- a. What agency procures furniture?
Each agency is responsible for acquiring and storing its own furniture. However, it is procured from the state vendor contract (Herman Miller for new space or KI for older space).
 - b. What do you spend annually on furniture?
Unknown
 - c. Who is responsible for inventorying, storing, and redeploying furniture?

The agency. The state does not hang onto furniture that is not currently available through the state contract as furniture parts and pieces of one vendor are not compatible with those of the previous vendor.

- d.** Do you have any metrics associated with furniture? *No.*

State of Oregon

Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
State of Oregon, Department of Administrative Services	Space Allocation	Valerie McBride	(503) 373-7086	valerie.s.mcbride@state.or.us
Background – The Department of Administrative Services manages 7.6 million SF of space with more than 550 leases. Recently the group also has become responsible for managing 1.6 million SF for the Department of Aviation. The department has a manager, 5 leasing agents, 2 support staff and 2 space planners. Agencies work with <i>Herman Miller</i> and have a choice of whether to use a consultant as a space planner or a DAM space planner. Agencies administer their own leases and pay their own rents/utilities. Some agencies, such as ODOT, have authority to acquire and dispose of property. They can also lease out these facilities, generally to other agencies (DAS would facilitate).				

General

- Approximately 40 percent of space is state-owned (3 million SF) and 60 percent is leased from the private sector (4.6 million SF).
- DAS conducts approximately 240 projects a year, mostly for office space.
- The process for leasing space usually takes between 6-12 months for space under 10,000 SF and 12-24 months for space over 10,000 SF.
- Typical term for new lease is ten years, with 2 or 3 two year options for renewal.
- Leases typically do not contain options to purchase.
- Leases generally include an early termination or cancelation clause, tied to lack of funding.
- Tenant improvements are done by lessor and are funded either with a combination of amortized and one time payments or just a one-time payment.
- A cost benefit analysis is used to determine whether to lease, build or buy.
- As lease administration is done by agencies, every lease is a full service lease.

Process

Usually agencies request information, such as market rates, before developing a request and business case (using "Office Space Request Form") and submitting it to DAS, certifying funding is available. If the request is for space over 10,000 SF it is termed a "major lease project" and referred to Capital Planning Committee for review and approval. A significant consideration is how long does the agency plan to stay in place. This is significant as agencies are prohibited from acquiring property (purchasing) and so DAS may consider purchasing the property and leasing it back to the agency. The leasing agent on the project is required to develop a comprehensive briefing paper to submit to the manager for project approval.

Issues/Concerns

- DAS tracks moving costs but not tenant improvements. 95 percent of leases are full service but agencies complain about the time required for reconciliation of operating expenses with what lessors are sometimes requesting (i.e. cell phones, uniforms, etc.). If they don't have the time to protest charges that look questionable, agencies default to paying the bill.
- Some agencies are having "trouble" with leases, so state may move to a modified net lease.
- Some agencies pay rent without reviewing billing.
- Exploring whether to centralize "reconciliation" of lease payments.

Space Allocation

1. **Date of Standards Review** – What is the date of the last space allocation standards review?
How often are standards updated?
July 6, 2003.
2. **Centralized vs. decentralized real estate function** – Does your state have a centralized real estate function that supports a universal standard or design philosophy or are projects tailored to the individual agency need?
Modified decentralized approach. DAS has authority to procure space for all agencies. So leases are negotiated by DAM but administered by agencies. Transportation, Corrections, and Forestry have their own facilities staff. Open landscape office design is the standard approach and agencies generally cooperate with this.
3. **Process** – Where in the leasing process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level?
The agency space request is signed by the director of the agency making the request and by DAM at the beginning. DM reviews at the transactional level again for compliance with the standard. Leases 10,000 SF and above are reviewed by the Capital Planning Committee to consider whether owning makes more financial sense.
4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF usage tracked against it?
 - a. SF/FTE – 250 RSF – *review on an individual level project basis but do not track it nor report on this metric. (The Space Request identifies “usable”, but agency is budgeted on “rentable”).*
 - b. Occupancy cost/FTE – *No.*
 - c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework. *Individual agencies may allow teleworking but this is not part of the state standard and utilization isn’t tracked.*
 - d. Other?
5. **Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?
DAS reviews requests for exceptions and determines on a case-by-case basis. Some assumptions are used but specialized spaces are identified and justification is required. Justification can take the form of description of past or current needs. DAS is generally very familiar with the space needs of most agencies, so adherence to the standard is rarely a problem. It is the small agencies that are the problem. DAS space planners must approve plans when they provide space planning services. This is harder to enforce when agencies engage furniture planners. Attorneys are accommodated with between 96 SF-120 SF of hard walled office space.
6. **Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? What is your process to review compliance with standards?
In an owned building, DAS must approve space and layout; in leased space, agencies have more flexibility.

- a. **Exception process:** Do you have an exception process? If yes, what do exceptions cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)?
Generally if there is a red flag it will most likely come from a small agency that rarely engages in space requests and isn't familiar with the process. Legal groups are always special in the densities but have established an office size for staff attorneys as part of the state standards.
 - b. **Appeals:** If conflicts arise, who decides?
DAM is generally able to work it out with agencies as DAM works at maintaining good relationships and in conveying the desire to provide agencies with what they need.
7. **Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles?
Director level, administrators and managers are allowed hard walled offices. Do not have a ratio.
8. **Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?
30 percent for conventional furniture workspaces and 45 percent for system furniture workspaces. 30 percent for support and special program space.
9. **Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
Growth Space is requested via a separate Office Space Request form and scrutinized closely. Growth is addressed with expansion options. On renewals DAM does not address deferred maintenance or compliance with current space standards.

Vacant space in owned facilities was a subject of an audit report in 2006. Now, each January and July, DAS requests agencies to report any vacant space or excess space down to the vacant seat level and whether they need DAS to seek other tenants for such space. A leasing agent visits all owned facilities at least once a year.
10. **Furniture standards:** Do you have furniture standards? If so, what are they?
No. But DAS acknowledges the differences between system and conventional furniture and respective influence on space allocation and layout.
 - a. What agency procures furniture? *Agencies.*
 - b. What do you spend annually on furniture? *Unknown*
 - c. Who is responsible for inventorying, storing, and redeploying furniture? *Agencies.*
 - d. Do you have any metrics associated with furniture? *No.*

State of Tennessee
Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
State of Tennessee – Department of Finance & Administration Division of Real Property Administration	Space Allocation	Mickey Gygi, Project Manager, Asset and Lease Management	(615) 741-4104	Mickey.Gygi@tn.gov
<p>Background – Prior to 1988, agencies were responsible for budgeting for real estate with mixed and sometimes poor results. In 1988 the State of Tennessee's Facility Revolving Fund (FRF) was created by T.C.A. 9-4-901 et seq. to be administered by the Commissioner of Finance and Administration with oversight/approval by the State Building Commission.</p> <p>State tenants occupying space in state-owned or leased facilities assigned to FRF are charged a square footage rate established by the Department of Finance & Administration (DFA) and approved by the State Building Commission.</p> <p>The Division of Real Property Administration of DFA is staffed with approximately 70 people provides or coordinates the provision of all space needs analysis and design, leasing of facilities, tenant relocation and annual evaluation of the FRF rate structure. The Department of General Services, through its Property Services Division, provides or coordinates the provision of day-to-day operations, maintenance and management services for all state-owned or leased space included in the FRF.</p> <p>Currently, there are 135 state-owned and 376 leased facilities assigned to the FRF program. This is complicated by agencies that receive Federal funding. The Department of Finance & Administration worked with the Feds to agree on what is covered and when payment can be expected. The Federal government tends to be very slow in paying. Agencies continue to manage about 16 percent of facilities with 84 percent being administered via the Facilities Revolving Fund. The Division's portfolio is approximately 9-10 million SF of which about 38 percent is leased and 62 percent is owned.</p>				

Space Allocation

- 1. Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated?

The guidelines have been in place for at least 25 years and were last updated 6-8 years ago. Informal updates are made when agencies add new positions.

- 2. Centralized vs. decentralized real estate function** – Does your state have a centralized real estate function that supports a universal standard or design philosophy or is projects tailored to the individual agency need?

Previous to 1988, agencies handled the real estate/facility function. Unfortunately, agencies did not budget properly for building maintenance, or the ongoing costs of moves, etc. In 1988, a Facility Revolving Fund was created (T.C.A. 9-4-901 et seq.,) and in 1993 the "real estate" function was centralized and the Division of Real Property Administration established. Under the FRF, "fair market lease rates are charged in leased and owned facilities should pay for not only the rental cost but also the facilities management costs of state-owned and leased space, including the operating and administrative costs of the Division. The costs include debt service on facilities financed with bonds, routine and major maintenance, relocation expenses and furniture for state agencies, and rental payments for leased space not owned by the state but occupied by state agencies.

Actuaries were engaged to calculate the cost of occupancy plus the “overhead” that the real estate group needed to operate and manage the facilities (owned and leased). A blended rate was derived from which rents and operating costs are paid from this Revolving Fund. The Division acquires a “master lease” for leased facilities and leases to state agencies (or feds).

As Tennessee leases space to the Federal Government (Feds), getting the Feds to pay for more than the lease cost was difficult. After negotiation, the feds agreed to pay an A 87 rate for space. If an agency has Fed funds involved in its program, the agency must determine how much of the costs are to be paid by the A 87 rate vs. FRF.

- 3. Process** – Where in the leasing process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level?

The state of Tennessee maintains “Guidelines”, not “standards”, based on space being determined by an employee’s position or function. Making the distinction between guidelines and standards was in an effort to convey that when employees are promoted they are not entitled to a newly sized work space. The Division’s manager will review with agencies the pay scale, job content, etc. to find where it should fit in the guidelines. Agencies are required to provide “explanations” as to why more space should be provided. In planning for future office buildings, 250 RSF is used or 225 USF. Once the space is acquired, more specific programming is developed, using the SF allotted by position. In addressing space requests, the Office Space Needs Worksheet, attached to the Space Action Request, is used for detailed programming information. The guidelines take into account what type of space is involved and thus design and layout can vary. Agencies can chose whether to space plan in-house or use the outsourced furniture vendor for a fee.

Agency relocation/moves are managed by the Division and paid for by FRF—unless unique. Information technology infrastructure design and installation are paid for by the agency.

- 4. Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF usage tracked against it?

Tennessee does not have staff who tracks space metrics. The contact periodically produced a space needs analysis report based on self-auditing. But the contact no longer has time.

- a. SF/FTE -
- b. Occupancy cost/FTE
- c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework.

The Staff “Time in Office Code” (#7 on Office Space Needs Worksheet) provides the information to help agencies plan differently for staff that spend a good amount of time working elsewhere. That may take the form of hotelling or shared workspaces.

- d. Other?

- 5. Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?

The contact has 25 years of experience and knows agency needs very well. Agencies with special purpose buildings (those that contain specialized labs) can opt not to have those buildings in the FRF program but then must budget and operate them separately.

6. Standards as Guideline vs. Rule: Is the standard a guideline or a rule that you enforce? What is your process to review compliance with standards?

- a. **Exception process:** Do you have an exception process? If yes, what do exceptions cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)?
When a review calls into question the space being requested, whether offices or other, the contact requests that an agency provide written justification.
- b. **Appeals:** If conflicts arise, who decides?
The contact decides and rarely has been questioned.

7. Ratio of offices to cubicles – Does your state standard have an allowable ratio of offices to cubicles?
The Division promotes open office but does not have a target ratio of offices to cubicles (though a majority of employees are in cubes).

8. Circulation - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?
A factor of 30 percent circulation is applied for both workspace and support areas.

9. Growth – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?
If it is a longer term occupancy planned, agencies can provide for growth but must provide documentation that this is consistent with staffing history.

10. Furniture standards: Do you have furniture standards? If so, what are they?
The furniture guidelines specify modular for open space offices.

Tennessee's Corrections agency is out of the furniture business. Being that the purpose was to train inmates for jobs, there are not lots of furniture jobs unless in a state with major furniture manufacturers. Corrections is now training inmates in construction jobs.

The state procures furniture via a single contract which is now with Haworth. The state Legislature presses to advertise every time the contract is up which results in some inefficiency. Division of Real Property Administration specifies the furniture but the agency procures it via the state contract. Although agencies procure the furniture, the Division approves the requests to ensure health/life/safety codes are being observed and the correct furniture is being ordered.

- a. What agency procures furniture? *If it is a project funded by FRFF, the Division designs the layout. In a non-FRF project, the agency pays and the Division's involvement depends upon the type of project.*
- b. What do you spend annually on furniture? *Do not know.*
- c. Who is responsible for inventorying, storing, and redeploying furniture? *The new furniture under each new contract is rarely compatible with the old. As a result, the state does not store furniture unless it has been newly acquired under the current contract (and thus ensure that the prior vendor could provide limited rehabilitation service). In general, used furniture is sold. Also, if the furniture has been redeployed 2 or 3 times, it does not hold up longer than this amount of time. (The Division used to store FRF furniture but encountered difficulties in disassembly and reassembly, so got out of the furniture storage business).*
- d. Do you have any metrics associated with furniture? *No.*

State of Virginia
Results of Telephone Interview

State	Topic	Name of Contact	Telephone No.	Email Address
Commonwealth of Virginia Dept. of General Services, Division of Real Estate Services	Space Allocation	Mason Hood	(804) 225-3770	Mason.Hood@dgs.virginia.gov
<p>Background – each governor serves only a four year term. Real estate function has been decentralized for a long while with agencies managing owned properties (with the exception of the seat of government) and procuring their own leased space. General Services in the past was responsible for oversight only of agency leasing. In 2005 via Executive Order formed the Division of Real Estate Services. Agencies balked at DRES guidance for a long while – agencies didn’t see how this service benefited them. DRES group has since made progress in understanding agency strategic plans and associated real estate needs in support of it.</p> <p>Now DRES has two teams of transaction managers led by a senior transaction manager. Work scope is:</p> <ul style="list-style-type: none"> • Disposition of surplus property • Easements (not many) • Leases <p>DRES administers 550 leases for agencies (including paying rent to landlords, then billing agencies for rent + DRES fee at \$68/hour. DRES doesn’t administer leases for independent agencies (i.e. Courts, workers comp, etc.). DRES is building portfolio information - have gone through every deed. DRES manages 1,500 leases. Some are temp transfers between agencies (their equivalent of internal sub-lease). DRES manages leasing for all executive branches for centralized support services. The Alcoholic beverage control board is only exec agency whose facilities are not managed by DRES as requirement is for retail spaces.</p> <p>Agency is trying to identify under-utilized properties but don’t have good information from agencies and don’t have a formalized process for tracking. By statute agencies must certify when they submit the space request (OSQ) that the information is correct and they have funding to support the lease. As for managing vacancy created due to layoffs, DRES finds some groups are good at reaching out to each other and others have portions of their agencies defunded but are not active in offering up the vacant space.</p>				

Space Allocation

- 1. Date of Standards Review** – What is the date of the last space allocation standards review? How often are standards updated?

August 2009. Try to update all policies and procedures every 2 years but typically doesn’t happen that often.
- 2. Centralized vs. decentralized real estate function** – A centralized function that supports a universal standard or design philosophy?

The Commonwealth has moved toward more centralized services. However, DRES as a newly formed group, has governance is limited to leased portfolio of executive agencies (centralized support agencies) and owned properties in the seat of government. This new group is not far enough along to have the clout to support a universal standard even over those groups whose real estate they manage.

3. **Process** – Where in your process are space allocation standards applied and by whom? Initial budget/planning and/or at transactional level?
Standard is applied at the transactional level.

4. **Efficiency target?** If your state has an efficiency metric or target, what is it and how is actual SF tracked against it?
In August 2009, the target was reduced from 205 to 198 USF. Agencies fill out the Office Space Questionnaire, and provide certification that they have funding to pay for the lease. DRES applies the standard and let agencies know. Transaction managers can approve up to 196 USF. Anything over that amount goes to the Division Director for approval. The application of space standards are applied at the transaction level on a case-by-case basis. Every transaction evaluates SF/FTE which is captured and reported on a quarterly basis.
 - a. USF/FTE – is captured transaction by transaction. Have an Access database that was developed in-house. Report on space per FTE on quarterly basis. Billings are generated from this database.
 - b. Occupancy cost/FTE - no
 - c. Utilization – ratio of seats to workers based percent of time in the office, usage of common areas, hotelling/telework. – DRES: Numbers are coming from agencies so don't trust the information to be consistently accurate.
 - d. Load factor - no

5. **Standards flexibility** – Given the variety of programmatic needs, how do you vary the application standards to flex to the agency type?
When agencies do not fit the typical administrative function, DRES takes specialized support areas out of the mix in the SF they measure against FTEs.

6. **Standards as Guideline vs. Rule:** Is the standard a guideline or a rule that you enforce? If yes, what is the process to review compliance with standards and do you have an “exception process”?
It is a rule that is applied with diplomacy. Although DRES takes the standard seriously, they deal with agency cultural obstacles (i.e. probation officers expect private offices and even though they point out that being behind a closed door isn't as secure as an interview room with a panic button, they balk at change. DRES compromise is to limit their office size to 100 SF.).
 - a. **Exception process:** Do you have an exception process? If yes, what does it cover (i.e. who gets a hard walled office, the number or sizes of support areas, etc.)?
The exception process isn't formalized. However, agencies if asking for a very high percentage of offices are asked to justify in writing. This includes detailing job content so that the DRES has the basis to make a judgment as to whether it is justifiable.
 - b. **Appeals:** If conflicts arise, what is your process for review and who decides?
Exceptions get bumped to the Director. How often agencies prevail varies by the personality of agencies and their leadership.

7. **Ratio of offices to cubicles** – Does your state standard have an allowable ratio of offices to cubicles?
No.

- 8. Circulation** - Do you have a circulation factor? If so, what is it and is it the same or different for workspace areas vs. support areas?

Circulation is applied to both work and support areas--30 percent if the # of cubes exceeds the number of offices, and 35 percent if the # of offices exceeds the number of cubes.

- 9. Growth** – How do you allow for growth over the lease term? Approved staff projections? Generous circulation factor? Lease expansion clauses?

If agency has specific needs for growth, they will have put in a funding request; DRES vets likelihood of funding with budget analyst combined with their own knowledge of initiatives the Governor is supporting.

- 10. Furniture standards:** Do you have furniture standards? If so, what are they?

Virginia Correctional provides the furniture.

- a. What agency procures furniture? Individual agencies.*
- b. What do you spend annually on furniture? No.*
- c. Who is responsible for inventorying, storing, and redeploying furniture? Inconsistent.*
- d. Do you have any metrics associated with furniture? No, but are thinking about tracking one-time costs.*

APPENDIX D

Washington State Small Working Group

Name	Agency	Phone	Email
Cami Feek	AGO	360-586-4079	camif@atg.wa.gov
Martin Fryer (Alt)	ESD	360-438-4174	mfryer@esd.wa.gov
Kaye Foldvik	DNR	360-902-1204	Kaye.foldvik@dnr.wa.gov
Kate Gordon	ESD	360-438-4177	kgordon@esd.wa.gov
Susan Harp	DOH	360-236-3934	Susan.harp@doh.wa.gov
Dean Heglund	L & I	360-902-6944	Hegd235@lni.wa.gov
Nadia Sarno	OFM	360-902-0618	Nadia.sarno@ofm.wa.gov
Virgil Sweeney	OAH	360-586-4949	Virgil.sweeney@oah.wa.gov
Patricia Young	DNR		Patricia.young@dnr.wa.gov
Dave Hickman	GA-representing DSHS		David.hickman@ga.wa.gov
Joy Johnson	GA representing Capitol Campus and other GA owned/managed facilities		Joy.johnson@ga.wa.gov

State Agency Questionnaire

DATE: December 10, 2010

TO: Stakeholder Group

FROM: Michael Van Gelder, Real Estate Services

SUBJECT: Review Space Allocation Standards

Thank you for your interest in participating in GA's review of the Space Allocation Standards. Below is a quick recap of the origin of Space Allocation Standards, the purpose of the current review, and how GA would like to engage agencies in its review.

Why does GA have Space Allocation Standards?

RCW 43.82.010 Section (2) provides: *"Except for real estate occupied by federal agencies, the director (of the Department of General Administration) shall determine the location, size, and design of any real estate or improvements thereon acquired or held pursuant to subsection (1) of this section. Facilities acquired or held pursuant to this chapter, and any improvements thereon, shall conform to standards adopted by the director and approved by the office of financial management governing facility efficiency unless a specific exemption from such standards is provided by the director of general administration. The director of general administration shall report to the office of financial management and the appropriate committees of the legislature annually on any exemptions granted pursuant to this subsection."*

What is the Purpose of the Space Allocation Standard?

Facility efficiency or space allocation standards are designed to provide an organization with a productive work environment, flexible and cost efficient space utilization, and facility budgeting predictability. The current state space allocation standard, established in 2000, was developed by a group of agencies, led by GA and OFM. The standard was incorporated into the GA Space Request form used by agencies to request new space. The GA Space Request was replaced in 2008 with the OFM Modified Predesign form. Last year GA revised the policy that is the basis of the standard. The current project is to evaluate the standard and determine if it needs updating in the light of current research and best practices and ensure that it is consistent with the OFM Modified Predesign document.

What does Space Allocation mean to my agency?

Today organizations are not only looking at the initial space allocation but also at space utilization as a means of achieving space efficiency and reducing occupancy expense. GA's authorizing statute requires GA not only to establish a space allocation standard, but also to report annually on exemptions granted.

The current space allocation target is 215 square feet per FTE. While this metric is generally achievable for most administrative requirements, special purpose facilities (i.e. labs, data centers, courtrooms, etc.) or locations that deliver services to the public with large support areas (community services offices, licensing offices, parole offices, etc.) do not readily fit this metric for space allocation. GA is not only reexamining how the space standard might be expanded to flex for a wider range of functions but also at how exemptions will be reviewed and recorded in the future.

Agencies and GA Working Together

In order to apply best practices to the state of Washington standards, GA is asking agencies first to share their view of the existing practices, through the use of the attached questionnaire. Subsequently, GA will review the results of this survey and provide agencies with a perspective of current research in the field and models used by other public or private organizations to allocate space and to incorporate metrics for utilization. Then, with agency input, GA will revise the state's space allocation standard as appropriate. GA will also review the basis for applying standards and for granting exemptions.

Therefore, as a starting point we would appreciate your undertaking to complete the attached questionnaire with as much detail as you can **by February 16, 2011**. Please return it to: Cara McClarty at cara.mcclarty@ga.wa.gov. If you have questions, please contact Cara McClarty at 360-902-7298 or Chris Gizzi at 360-902-7341.

Your involvement in the stakeholder group will be critical, but we realize all of you are very busy so we will ensure your time is spent productively. We will be sending out a list of meeting times soon. Below is a recap of the timeline:

Schedule:

10/18/10 - 10/29/10	Develop Action Plan and Schedule
11/1/10 – 1/21/11	Research and compile data from other organizations
1/24/11 - 2/25/11	Develop Options and review options with Small Group and Stakeholder Group
3/04/1 - 4/08/11	Develop Preliminary Draft and review with Small Group and Stakeholder Group
4/11/11 – 4/29/11	Develop Final Draft of Space Allocation Standards
5/02/11 – 5/31/11	Formal review of Standards with all stakeholders
6/01/11 – 6/31/11	Finalize Standards and review and approval by GA Director and OFM Director
7/01/11	Implementation

AGENCY SPACE ALLOCATION STANDARDS QUESTIONNAIRE		
Agency:	Contact Name:	Phone #:
	Email address:	Date:

1. Is your agency changing how it does business in a way that will have impacts on the amount of space required and/or how space is used in the future? If so, please describe.
2. Who in your agency makes the determination of the amounts and types of spaces needed? What is the internal approval process?
3. What percentage of agency staff occupy:
 - a. Offices
 - b. Cubicles
4. What is the agency methodology for determining the overall amount of space requested:
 - a. Modified Pre-Design (Space Planning Data worksheet)
 - b. GA Space Allocation Standard
 - c. Unique agency standard (if so, please provide)
 - d. Other (please describe)

Space allocation standards may vary in square footage allocations depending on whether conventional or modular furniture is being used.

5. Does your agency have a furniture standard? If so, please provide a copy or description.
6. Does your agency use conventional (free standing) or modular furniture?
7. How much does you agency spend per year on furniture?
8. Please describe your agency furniture procurement process?
9. How does your agency inventory and store furniture?
10. What are standard cube sizes?
 - a. 6 x 8
 - b. 8 x 8
 - c. 8 x 10
 - d. Other (please describe)

11. How does your agency determine the number of offices requested for which staff?
 - a. Job classification
 - b. Acoustical or visual privacy needs
 - c. Length of service
 - d. Other (please describe)
12. How does your agency determine the number of staff assigned to cubicle workspaces?
 - a. Job classification
 - b. Work content
 - c. Other (please describe)
13. How do you allocate work space to staff that travel or spend a large percentage of time in the field?
14. How is work space allocated to non-employees (i.e. consultants, volunteers, interns, etc.)?
15. What is the agency methodology for determining the agency support space needs (typical)
 - a. Data closets
 - b. Conference rooms
 - c. Training rooms
 - d. Interview rooms
 - e. File rooms
 - f. Coffee / lunchrooms
 - g. Restrooms (staff and public)
 - h. Other
16. Support Space (specialized)
 - a. Laboratories
 - b. Other (please describe)
17. Does your agency track hours of usage for the above support spaces? If so, please provide.
18. Does your agency track the percentage of time spent in the office by workers whose job requires travel or working in the field? If so, please describe.
19. Is there any other information you would like to share regarding space allocation standards?

APPENDIX E
SUMMARY OF STATE AGENCY RESPONSES

Agency	Ratio offices to Cubes	Tool Used for Estimating Space Need	Office Sizes	How do you determine office vs. cube?	Cube Size(s)	Shared workspaces	How do you determine support space needs?	Specialized support areas?	Do you track hours of usage of work or support spaces?	How does agency plan for non-employees?	Furniture Standard, Expense, and Procurement	Observations or Other Information Shared
AGO	60 percent offices; 40 percent cubicles	Agency standard	Senior level 224 – 542 SF; Mid-level - 168 SF; Professional/Lower level Mgrs.- 120-140 SF	Job Class	8' x 10'	Recently have shared work spaces by job types that are in the field a high percent of time (i.e. investigators). Otherwise few share work spaces.	Varies by Division. Divisions that have depositions need more conf rooms. Medicaid fraud divisions need sealed evidence rooms.	Libraries/research center, work rooms (for large case work), moot court rooms (also used as conference rooms); secured central reception.	No	Plan for cubicle space for law clerk/interns as this makes up largest volunteer program. Also plan for volunteer consumer resource centers.	Correctional Industries. No standard. Maintain a reuse center. Furniture costs depend on whether major projects planned – 2010 the agency spent \$26,638.21.	
DNR	20 percent offices; 80 percent cubicles	Agency Standard	None specified.	Job Class	8' x 8'	3 job types assigned Shared workstations; 1 job type assigned transient workstations; 5 job types assigned Community work space	Support areas are sized to support the number of people planned for a particular site.	Based on the functions of the work groups.	Do not track usage of support spaces. Facilities evaluated unoccupied work stations that were assigned to employees during working hours in order to develop standards for shared workspaces.	Transient workstations are provided. This is a work surface with a desktop and/or docking station that anyone can use.	Existing furniture used to reconfigure systems furniture. Some regions use Haworth systems furniture. Small regional offices use freestanding furniture and a mix of surplus modular furniture. Most purchases of new furniture components are balanced with cost savings in reducing leased space. DNR maintains furniture inventory at NRB; regional site managers maintain small storage areas for freestanding furniture and send surplus Haworth components to NRB.	<ul style="list-style-type: none"> Consider the work group and individual function when applying space standards. Provide allowances to standardized specification in cases where the footprint of the building is an odd shape or the standard box does not fit within the Architecture of the building. Consider when establishing set standards, flexibility has to be maintained for design and practicality allowing modifications for tight spaces in small office spaces where standards cannot be met.
DSHS	Unknown	Modified Predesign GA Standard Agency standard 1995 Standards Amy provided in 2009	Facility Managers within each administration determine the amounts and types of space needed based on GA space	Job Class	The majority are 8' x 8' or 7' x 9'.	DSHS contact is working on a telework program. No specifics received yet.	Coffee/ lunchrooms, training and conference, rooms rely on GA space allocation standards. File rooms – based on need Interview rooms –	Data closets – ISSD	No	Space is allocated based on typical workstation sizes (8' x 8' or 7' x 9').	Multiple furniture systems are used within DSHS. The only common standard applied across the agency is cubicle sizes. The vast majority of DSHS cubicles are 8'	DSHS does not have an adequate internal approval process that allows for consistent application of space across all programs.

			allocation standards and program organizational charts.				based on DSHS admin. / division needs Restrooms – DSHS Addendum to GA standards.				x 8’ or 7’x 9’. DSHS does not have a centralized furniture procurement process. Each administration manages furniture independently so cost is unknown.	
DFW	10 percent offices 90 percent cubicles	Modified Predesign, DFW standard, GA standard	None specified.	Job Class and work content (also varies by building)	Varies by ‘attic stock’ available		GA standards	GA standards	No	Hotelling or transient work space	Agency procures furniture from Correctional Industries, Haworth, and State Surplus. Only furniture stored is NRB.	
DOH	Less than 10 percent; about 90 percent	GA standard DOH standard that includes perimeter circulation and built spaces located in interior core	Secretary, Deputy Secretary, State Health Officer (1 st level); Assistant Secretaries (2 nd level), CTIO, and program managers who manager other managers (3 rd level) are allocated offices.	Other staff may request offices based on business need but are allocated subject to availability. Not all staff are allocated a workstation or office.	8’ x 8’		Data closets sized to IT specs for racks and equipment. Conference rooms are based on standards and special program needs; 1 training and 1 computer training room; interview rooms based on program needs. Filing needs documented. Confidential or secure rooms are allocated based on documented need and size based on need or grant requirements. One coffee bar per 10,000 SF; if more than that but enough for 2 coffee bars, consider a lunchroom. Either contains a counter, 2 refrigerators, a sink, vending machines and tables/chairs.	Public Health Lab is uniquely sized to meet the functionality for that space, using equipment or process specifications for size, building and fire code requirements, industry best practices and recommendations from consultants. Lab needs are determined by legislative directives, master planning, and consultant studies.	No Staff that travel or spend a large percentage of time in the field are assigned a dedicated workstation.	The program estimates the number of workstations needed for this use. Sometimes workstations can be “borrowed” from an adjoining program for this use. Often these workstations are also used for other purposes (storage) and may have originally been planned for growth. “Virtual cubes” have been tried for this purpose, but over time they became permanently assigned to staff.	Furniture standard is Haworth systems furniture in platinum colors configured to meet ergonomic needs (standard U configuration) that includes on tall wall perpendicular to the window, bottom raceway for electrical and voice/data wiring, and two 24” wide and one 30” wide surface, one 2 drawer lateral file and one 2 or 3 drawer pedestal cabinet. Tall wall has 2 closeable bins and one open shelf. Standard is 2 voice and two data ports, 3 electrical outlets, each on own circuit for task lighting, computer equipment and miscellaneous. Standard building power for desktop	

											computers and printers. CI furniture is used for reception, libraries, lunch and conference rooms. Printer alcoves have dedicated exhaust for air quality. Annual expenditure - \$150,000. A spreadsheet of furniture inventory stored at warehouse is kept.	
ECY	15-20 percent offices; 80-85 percent cubicles	Modified Predesign GA Standard	Section Head or above, Program budget planners, personnel managers, and direct reports to Director are allocated offices. No sizes referenced.	Unofficial policy by job type referenced in office sizes.	8'x 8' Unit supervisors and line level supervisors do not occupy offices.	Permanent staff is assigned a dedicated workstation. Field staff and seasonal staff share workstations or use conference room for paperwork.	Most offices fall into 3 functional types: HQ, regional, and field offices. Maintain samples of space sizes and programming information appropriate to function of office.	Labs, operational centers, and field storage.	No. Estimate that half of staff performs some form of field work. Also "... a good portion of our support specific spaces are seasonal based."	Depending on the length of term and nature of work, consultants or volunteers may or may not be assigned a work space. Varies by project.	Don't allot a specific budget to furniture. In smaller locations operating funds are spent to acquire furnishings, in larger installations furniture purchase and installation is funded with COPs. Agency consistently procures one brand and model of furniture. Each larger facility has 'attic stock' of furniture parts and accessories. Given standardized furniture and finishes, can redeploy across facilities.	One standard (i.e. 8'x 8') and using one brand and model of furniture reduces operational costs. Adjustments are made within the 8'x8' workstation to address ergonomic issues. Many state agencies attempt to have several space size standards, and most have multiple brands and models of furniture. Each of these agencies either employee laborer type positions or hire contractors to constantly modify their workstation layouts. The expense of trying to maintain this type of policy/practice is huge. Not only do you need funding for the labor, but you also need much more storage

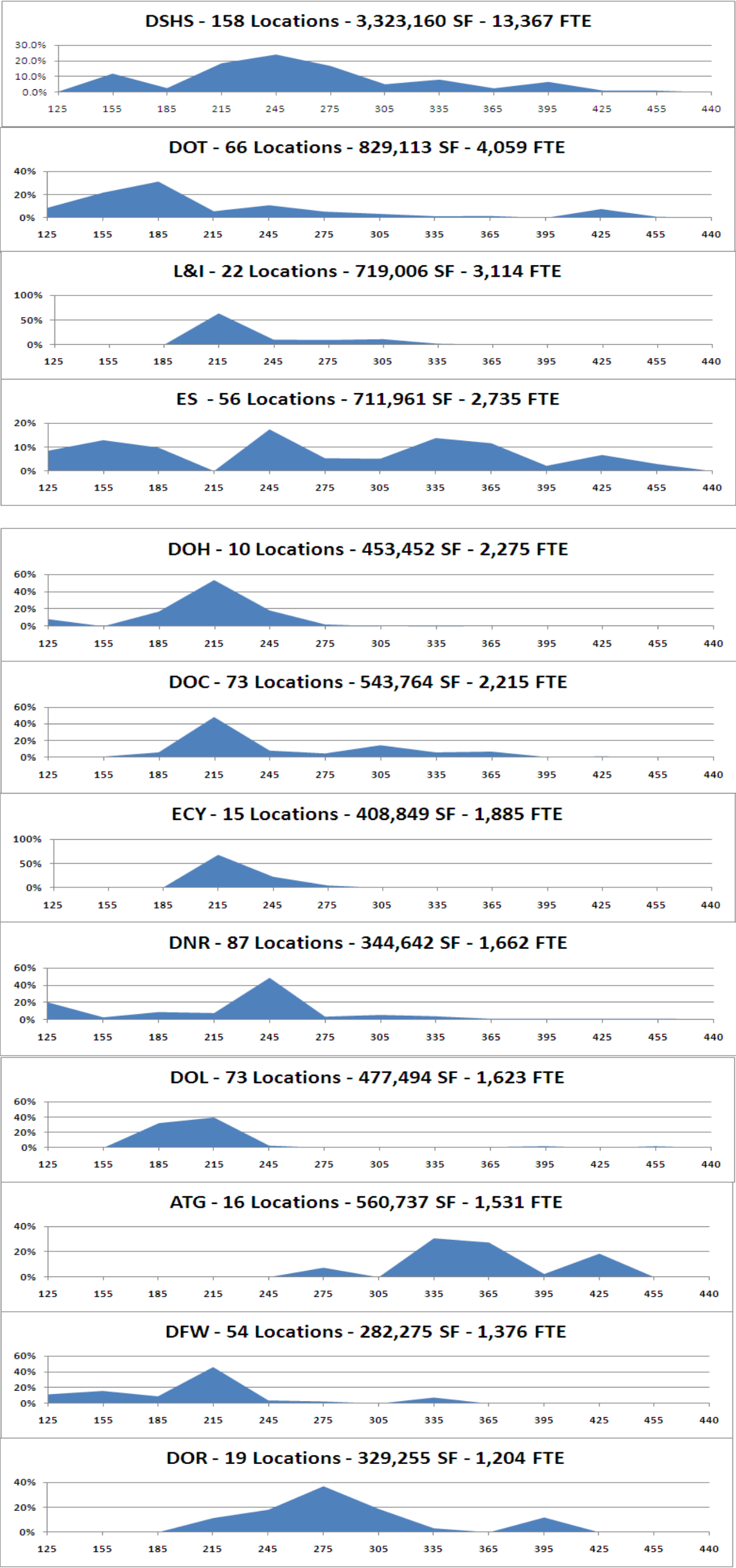
												space to manage the inventory of furniture parts and pieces.
ESD	10 percent offices 90 percent cubicles	Modified Predesign, ESD Space Guidelines GA Standard	140 SF - managers with 10 or more staff and work with confidential information 25 percent of time 192 SF – DAD, WAD and above.	Job content and type.	8' x 8' typical; 8' x 10' – supervisors with less than 10 staff; 6' x 6' or 6'x 8' for UI or Telecenter	All staff is provided an assigned workstation unless determined otherwise by their management.	Needs are determined based on past practices and specific requirements of a Division (Work Source needs large Resource Room and training space; District Tax Office does not)	Same as typical support space methodology – past practices.	ESD provided GA with usage information for space standard exemptions for Work Source offices. Otherwise do not track percent of time spent traveling or working in the field.	Occupy available workspaces in headquarters or Work Source/Work First office; do not have outside staff in DTO or telecenters.	See Space Guideline for Furniture Standard. Furniture is ordered by Divisions and thus not tracked by Facilities. Furniture constraints are balanced with the functionality and cost of replacing with systems furniture. Work stations cost between \$5500 and \$7500. Furniture is not inventoried but it is stored at Tumwater Distribution Center.	Per the ESD space guidelines the separate Division functions results in differing space allocations as below: • Headquarters: 215 SF • Work Source/Work First: 350 SF to 385 SF • Telecenter: 215 SF to 235 SF • DTO Offices: 215 SF to 250 SF Variance from above is reviewed by Offices Services Facilities manager and approved by GA.
LCB	10 percent offices (Directors/ Mgmt.); 90 percent cubicles	Modified Predesign GA Standard Unique agency needs	Try to follow GA Space Standard.	Job class Privacy needs.	Typically 8' x 8' or 8' x 10'. Smaller if space constraints. Files and bookcases are in cubes instead of hallways or along the wall.	Downsized requirements for some offices have resulted in some cases officers who spend more time in the field being assigned to shared workstations instead of private offices.	See questionnaire response – detail is provided for this topic.	N/A	No	They utilize available vacant space. Most long term consultants are utilized in our Info Technology Division where we usually an extra cubicles that can be used.	No furniture standard. A modular furniture system is used for cubicles and conventional furniture for offices. Have found that standard desks aren't appropriate for computer use; often use modular desk/CRT configurations. Expense is unknown – try to reuse existing. Most furniture is procured through Correctional Industries; also use state or	See questionnaire. Agency rep provided a good amount of detail in answers to questions.

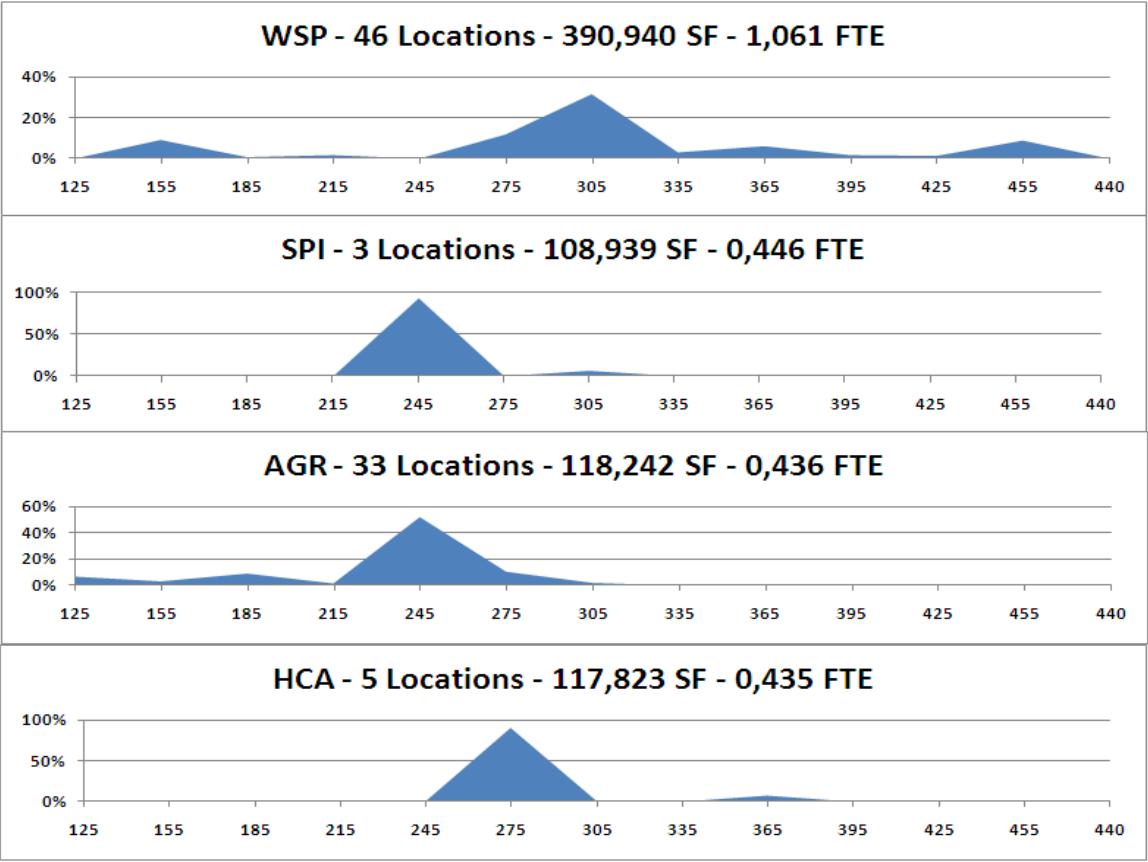
											agency surplus programs where possible. Limited furniture is stored.	
L&I	10 percent offices 90 percent cubicles	Modified Predesign GA Standard	Rarely build new offices after initial occupancy. Reuse existing offices when leasing new space if they are a fit for the space program.	Job class and privacy needs	8' x 8' most typical in HQ building; 7.5' x 9' most typical field offices; and 6' x 8' used if it is only option. Additional sizes flex to meet floor plan and business need.	Field staff is assigned the same workstations as the other staff – do not track time in the office vs. in the field.	Data closet – 10' x 12' typical though varies. At least one interview room if location has customer service counter. File room – as needed. One lunch/coffee room; coffee bars added to provide access for staff.	Labs designed around equipment and processing space needed. Size and design done in coordination with users.	No	Non-employees are provided workstations if they require regular contact with agency staff.	Furniture from Correctional Industries (\$73,725), Workplace Development (Steelcase - \$37,711, Haworth from HBI Office - \$29,915, Creative Office from Gordon Products - \$13,789 and Ebony Office Interiors \$4,257.). No major projects. Furniture ordered in 2010: chairs, adjustable height work surfaces, and misc. Programs request, Facilities develops options, programs confirm payment method, and Facilities orders from Purchasing. Inventory and storage in agency warehouse.	Programs request space of Facilities Mgmt.; Facilities develops options and costs to determine if can be accommodated within existing or need new space. Executive level approval required before request new space.
OAH	58 percent offices; 41 percent cubes	Modified Predesign	100 SF for judges in offices	Judges in offices; support staff in open areas or cubicles.	8' x 8' for support staff	Job class and work content		OAH needs hearing rooms that seat 4-16 people. These hearing rooms also serve as conference areas.	Not to the level that I would like to see.	Based on availability.	GA assists with furniture procurement. Over the years not much is spent on furniture although the agency is trying to get all employees to a minimum standard.	Recent agency standard - L-shaped desk with ergonomic corner section. Ergonomic chair. Under desk 3 drawer file. Judges provided with bookshelf and 2 drawer file. Staff do not travel or spend time in the field. OAH incorporated teleworking for a number of judges. Since many

												hearings are performed telephonically, this has relieved pressure on available offices in the Seattle and Olympia facilities.
OFM	31.3 percent offices; 68.7 percent cubicles	Modified Predesign	Acoustical or visual privacy needs. No office sizes referenced.	Work content	9' x 9' average but varies.	Contractors use drop in location or conference rooms with WiFi and extra data ports.	Conference or training rooms based on usage and business need. File rooms consider security and scanning needs. A coffee bar is typical.	IT lab space determined by business needs.	Can refer to Outlook data but don't customarily track it.	See shared workspace response.	FY08 = \$276,750; FY09 = \$53,500; FY10 = \$13,500 Correctional Industries for procuring furniture. Furniture \$5,000 or more is tagged and inventoried.	

APPENDIX F

STATE AGENCY UTILIZATION





APPENDIX G
DEFINITIONS

Activity Settings: Varying work settings to suit individual and group activities, usually on a first-come, first-served basis

ADA: Acronym for the Americans with Disabilities Act (ADA) which is a federal law, enacted in 1992 to assist people with disabilities to obtain access to public facilities. All State facilities that are accessed by the public are required to comply with the ADA. The most commonly known barriers are access to the buildings, functional restroom facilities, elevators to upper levels and adequate parking. Other requirements apply to clear path of travel and turning radius to ramps, minimum pounds of pressure required to open doors, height for drinking fountains and sinks, sizes of toilet rooms, placement of hand rails and fire alarms.

Agency: In accordance with RCW 43.30.020, a Public Agency is “Any state board, commission, committee, department, educational institution, or other state agency which is created by or pursuant to statute, other than courts and the legislature; ...”

Building Codes: These codes are to provide safe and functional facilities and apply to new construction and remodeling projects in both owned and leased properties. Building Codes cover mechanical, plumbing, life safety, national electrical and the Uniform Building Codes. The Division of Building Safety reviews all plans and specifications for new buildings and major remodels.

Building Common Area: The area(s) of the building that provide services, support, or horizontal circulation to building tenants, but are not included in the areas of any specific tenant. Common area in a building includes corridors, building lobbies, custodial rooms, mechanical and electrical rooms, restrooms, building conference rooms, break rooms, and food service areas shared by the entire building.

Building Owners and Manager Association (BOMA): An international organization serving the needs of the office building industry. The organization has developed a standardized method of measuring office space.

Building Rentable Area: Gross Interior Area minus Vertical Penetrations. This calculation should be fixed for the life of the building unless a vertical penetration is added or removed from the building or area is added or removed from the building.

Building Support Area: That portion of the floor area that is not occupiable or used by personnel. It consists of the mechanical, custodial, and construction areas, including their enclosing walls, and represents the difference between gross area and occupiable area.

Buildout: Refers to the interior construction of a lessee’s space whether new construction or the remodeling of the existing space. Also referred to as “Leasehold Improvements” or “Tenant Improvements”.

Built-to-Suit: A leased building that is designed and built to the specifications of the occupying agency. Also applies to owned buildings constructed in response to a pre-architectural performance specification

Circulation Space - Circulation is based on actual layout of a floor and may vary over time, or as space configurations change, and from floor to floor depending on the number of tenants on a floor. Circulation includes spaces, such as corridors and aisles, provided within an office to allow for access to various work areas and includes building code required access and egress between stairwells, restrooms, elevator lobbies and exterior exits/lobbies. Circulation within departmental spaces is normally included in the space allocation standards. Circulation is determined by the space available, features of the space, work flow requirements and furniture layouts. There are no specific footage guidelines for circulation, but circulation space must adhere to all state and local codes and Americans Disability Act (ADA) accessibility requirements.

Common Space: The area for all of the non-occupiable space that cannot be easily reconstructed as another type of space. Examples are common corridors, lobbies, restrooms, copy rooms, mechanical rooms, electrical rooms, etc.

Construction Area: The gross area of a building measured from the exterior face of exterior walls on all floors including basement(s) and mechanical penthouse(s). Construction Area is not used for determining rent.

Conventional Furniture: Free standing furniture not supported by modular partitions.

Cost Benefit Analysis: An analysis concept that compares quantity and quality of alternative means for satisfying a specific objective. The analysis ranks the alternatives according to the degree of economic efficiency with which they achieve specific goals. It also enumerates significant qualitative considerations in the ranking. The overall costs of each alternative are compared to the benefits achieved by its implementation (savings, income, increased productivity, improved service levels, etc.).

Demising Wall: The wall, which separates a lessee's space from another lessee's space or the building common areas.

Efficiency: The ability to produce a desired effect, product, etc. with a minimum of effort, expense, or waste.

Enclosed Office or Workstation: A workstation with four-sided, floor-to-ceiling enclosures using drywall, demountable or removable partitions.

FF&E: Acronym for "fixtures, furnishings and equipment", the movable components of a facility.

Floor Common Areas: Corridors, lobbies, custodial rooms, mechanical and electrical rooms, restrooms, conference rooms, and food service areas used only by the tenants of that floor.

Floor Loading: Floor loading is a measurement of the structural capacity of a building floor to support a specified weight expressed in terms of pounds per square foot. The floor loading capacity is critical for heavy weight areas such as computer rooms, machine rooms, libraries and storage/file areas.

Free Address: Multiple workspaces shared by individuals on a first-come, first-served basis.

F.T.E. : Acronym for “full time equivalent or employee”. A measure of labor utilization which approximates the number of persons employed by a department and requiring office space. This does not generally include projected staff, part-time positions, volunteers or consultants. However, office space planning is usually based on the anticipated or projected number of FTEs over a period of time.

Functional Program:- A detailed statement describing what is needed by a department to perform its activities efficiently, safely and comfortably. It includes a description about the occupant group’s requirements for each workstation, support, circulation and special purpose spaces, based upon the approved space standards and guidelines. It also describes how the areas relate to each other functionally and may describe the type and size of furniture and equipment that needs to be accommodated. A functional program is used by a designer to complete a space layout.

General Office Space: - Office space used to accommodate general administrative functions (workstation, support, and circulation space) and does not require special design and construction because of other special program delivery activities. General office space can usually be reallocated between departments with minimal changes required.

Gross Building Area: The total constructed area of a building is the sum of all spaces on all floors of a building measured to the exterior enclosing walls.

Gross Interior Area: The total area measured to the inside face of the exterior walls at the floor plane.

Gross Square Feet (GSF): Gross square feet is the sum of all floor areas and any basement (except unexcavated portions), attics, garages, roofed porches, mezzanines, loading platforms, shipping platforms, penthouses, mechanical equipment, floors, lobbies and corridors. Gross area does not include open courts, light wells, upper portions of rooms or lobbies which rise above the story being measured.

Group Address: A space designated as a group or teamwork environment, usually for a specific project and a designated time. People often continue to have their own workspace.

Growth Space: Space for workstations or support functions of full time equivalent positions (FTE), which are not included in the current budget. Growth space may be added only with authorization from OFM.

Hoteling: Shared workstations provided on a reserved basis in the main office facility where there are fewer offices than staff.

HVAC: Acronym for heating, ventilation and air conditioning.

Individual Work Areas: Workstations or private offices that each employee uses to carry out their work. Size may be based on rank, task and function of the work performed.

Leasehold Improvements: Improvements made to the lease premises for the lessee. Improvements permanently attach to the premises unless they are trade fixtures and they remain within the premises after the end of term of the lease.

Lessee: The user of the space often referred to as the “tenant”.

Lessor: The owner or manager of the space who is leasing the space.

Load Factor: A percentage value attributed to non-rentable space. It is used to pro-rate lessor’s costs back to lessee(s).

Non FTE Staff – Part-time positions, consultants, volunteers, interns, etc. that do not have State position numbers

Open Office Plan versus Closed Office Plan: Open office plans refer to the use of free-standing panels and systems furniture and space planning techniques that integrate function, aesthetics, acoustics, lighting and placements rather than private offices or enclosed spaces. Closed office planning makes extensive use of private and semiprivate offices with full-height walls. Existing inventories of furniture, if any, may or may not be compatible with open office planning techniques. Likewise, furniture systems and/or open office planning furniture components manufactured by different vendors are typically not compatible with each other.

Open Workstation - A workstation with no enclosures or two to three enclosures below ceiling height using screens or panels.

Partition Wall: A wall constructed to create work areas such as offices or conference rooms within the space, as is distinct from the demising walls that encircle the space.

Programming: That portion of the planning process for an area within a building which, through the collection and analysis of data regarding occupants, work patterns and required equipment, leads to the Statement of the design problem and the specifications for its solution.

Punch list: A list of incomplete remodeling items or construction items which are unacceptable to the lessee, which upon remedy and completion will usually complete the obligations of the contractor under a construction contract. It is the lessor's responsibility to satisfy the lessee's concerns and motivate the contractor to correct all the items on the punch list.

Rentable area: The actual space occupied by the tenant agency, plus the building's shared facilities.

Rentable Space: All potential leasable floor space in a building.

Satellite Office: A field office located away from the main office, closer to employee's homes, where staff work on a full-time basis.

Space Envelope - The total amount of general purpose office space provided to a department.

Special Program/Purpose Space - Non-standard areas required by an agency to accommodate specific activities which are unique and essential to delivery of the agency's particular program in addition to the standard office space allowances for workstations and support space. For example, laboratories, health units or clinics, courtrooms, hearing rooms, staffed libraries, mainframe computer rooms, workshops, central mail operations rooms, radio/communications centers, survey and mapping rooms, public assembly areas, exhibit areas, conference or training complexes, central storage/warehousing areas, trade shops, etc.

Shaft Space: Vertical penetrations spanning more than one floor. Such types of spaces are stairwells, elevators, mechanical and plumbing shafts.

Shared Space: Two or more people share the same workstation.

Standard: Something established for use as a rule or basis of comparison in measuring or judging capacity, quantity, content, extent, value, quality, etc. (i.e. *standard* of weight or measurement).

Support Space - Shared space containing furniture, equipment or materials used by an agency. For example, photocopier rooms, file cabinets, meeting rooms, coffee counters, etc. These shared spaces are located near the people that use them on a regular basis and may be enclosed or open depending on the type of equipment and the work performed in them. This space is not generally used for office personnel.

Space Allocation Standard(s) - A set of prescribed maximum space allocations which must be followed when planning office space. Standards do not establish or imply minimum space entitlement and consideration should be given by departments to meet their requirements using less space.

Space Utilization is a measure of whether and how space is being used. The utilization rate is a function of a frequency rate and an occupancy rate. The frequency rate measures the proportion of time that space is used compared to its availability and the occupancy rate measures how full the space is compared to its capacity. Utilization rates can be assessed in terms of both actual use and predicted use.

Swing Space - Office or special purpose space temporarily used while renovations or capital improvements are underway or when new space is being acquired. Swing space is provided whenever office accommodation is being acquired for occupancy of 10 years or more.

Systems Furniture: Interconnected modular partitions that support work surfaces and storage components. Systems Furniture often incorporates internal raceways for power, data, and telephone service to the workstation.

Telecommuting: A combination of home based or remote worksite space.

Tenant Improvements -The interior of an office building, designed and constructed to meet the requirements of the department. This includes partitions, screens, finishes, signs and modifications to telephone, lighting, electrical, heating and ventilation as necessary to service the office layout. The term 'fit up' is sometimes used to describe the construction of tenant improvements.

Tenant Rentable Area: The Tenant Useable Area plus a prorated share of the Floor Common and Building Common Areas. This figure is used to calculate rent.

Tenant Useable Area: The area of a building assigned to a tenant agency. Usable Area is the actual area of the floor occupied used for Work Stations, Support Space, Special Program Space, and the Circulation for those spaces. This area is computed by measuring to the finished surface of the tenant side of corridors and to the center of partitions that separate the office from adjoining tenants.

Uniform Building Code (UBC): The model code of building and construction standards published by the International Conference of Building Officials. The UBC is generally adopted and enforced by municipalities in States west of the Mississippi.

Universal Workstation: A planning module of 80 square feet (nominal 8 feet x 8 feet) based on an open office furniture system, with several possible work surface and storage configurations.

Usable Area: On a multi-tenant floor, usable area is the total size of the floor less hallways, elevators, restrooms, etc. On a single tenant floor, usable area is the total size of the floor less the building lobby, HVAC ducts, stairwells and elevators.

Usable Space - The space that is actually useable by a department. It does not include accessory areas such as washrooms, janitor closets, electrical and telephone closets, public corridors and elevator lobbies. Corridors within the boundaries of a department's space are included in the useable space.

Work Cluster: An office or lab planning concept in which four to ten offices or work stations are physically arranged to create and enhance a small group working environment. Characteristics of a work cluster include easy physical access between the members of the group and a common area specially provided for each grouping of people.

Workstation: The work surface, seating, filing, storage and reference area required for the immediate workspace occupied by an employee and allow them to perform their job functions. Workstation space may be enclosed or open depending on the confidentiality, security, visual and acoustical privacy requirements of the job. Workstation space also includes the two foot half-aisle required for direct access into the space. With systems furniture, workstations are enclosed with panels and with conventional furniture, workstations may be enclosed with freestanding panels or they may be entirely open to the surrounding environment.

Virtual Office: Portable working environment aided by electronic communication that can allow someone to work anywhere, anytime.